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# THE JOURNAL OF VOLUNTEER ADMINISTRATION

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The Association for Volunteer Administration (AVA) is the professional association for those working in the field of volunteer management who want to shape the future of volunteerism, develop their professional skills, and further their careers. Members include volunteer program administrators 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. AVA is open to both salaried and nonsalaried professionals.

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# Larimer County Senior Citizens Property Tax Workoff Program

Lorrie Wolfe

## INTRODUCTION

The Larimer County Senior Citizens Property Tax Workoff program offers older homeowners the opportunity to work in a budgeted temporary county position in lieu of a cash payment for their property tax. These seniors perform meaningful and necessary work, and the County gets qualified, dependable temporary help at very low cost. By working together, County staff gain an understanding of the capabilities of older workers, and the seniors change from adversaries to advocates for their local government. It is not surprising that many participants stay on as volunteers after "working off" their property tax.

## HOW THE PROGRAM BEGAN

The idea for a Senior Citizens Property Tax Workoff was first brought to the City of Fort Collins, Colorado in 1979 by Ed Chilcott, age 70, a volunteer member of the City's Senior Advisory Board. Mr. Chilcott had read in Reader's Digest about a program in Hartford, Connecticut which allowed unemployed homeowners to serve as temporary employees in lieu of paying property tax. His concern was for the retired person on a fixed income who was facing property taxes that had tripled in the last ten years. This is particularly a hardship for seniors who have a fixed income above poverty limits and are ineligible for local and fed-

eral rebates. While Californians were feeling the first impact of Proposition 13's cutback of government services, the City of Fort Collins and Larimer County were developing a different approach and maintaining needed levels of service. Five years later we have Senior Property Tax Workoff programs operating in city and county government and in the local school district.

## PROGRAM STRUCTURE

The Senior Property Tax Workoff is a win/win service. The County benefits primarily by getting competent, dependable temporary workers to perform needed short-term jobs. The seniors work at minimum wage minus FICA, which is \$3.65 - .52, or \$3.13 an hour, up to the amount of the county portion of their tax. Some jobs are on-going and routine, such as clerical or groundskeeping, or may reduce a backlog of filing. Other jobs require different skills, such as operating tillers for community gardens, or researching and designing a safety training program for heavy equipment operators. No matter what level of skill is needed, all workers are paid the same rate, resulting in a substantial savings over the cost of other temporary employees.

The seniors are available on short notice to fill emergency needs or handle peak work loads. Most jobs are filled within one to two days of

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the initial request, because the applications are kept in a "skillsbank" arrangement that identifies the skills available.

In addition to low-cost, readily-available workers, the county benefits from several unique attributes of older workers. They are more dependable than younger workers in terms of punctuality. In fact, they may come in early in order to be ready and "on the job" at the agreed upon starting time. They are responsible and thorough--often they will continue to work as volunteers in order to finish a particular job. The work ethic has been a part of their lives for over 40 years, and they will accept direction and supervision for the sake of accomplishing tangible results.

In contrast to the image of seniors as "stuck in their ways," they actually are very willing to take on tasks completely different than their previous work experience--and they find it fun! Because they are not looking for career growth experience, these older workers are not threatening to paid staff who sometimes fear the young volunteer as future job competition. And because the seniors are there by choice, for a specific, limited financial benefit, and because the department has requested a senior worker, the stage is set for a pleasant and rewarding work experience.

The county benefits from the involvement of Senior Tax Workoff participants in the same way that it benefits from volunteer involvement--that is, by the creation of informed citizens who really understand a portion of county government. Many workoff participants expressed initial mistrust of the government and "bureaucrats." But after working side by side with government employees, they discover the bureaucrats to be human beings, struggling with increasingly complex issues, growing caseloads, and dwindling budgets.

Some who said they "would never have volunteered for the county," but who would gladly work in exchange for property tax credits, became committed volunteers. Two older gentlemen had so much fun working off their city tax by performing data entry on the police computer, that they came to the county court as volunteers and updated all the crime statistic files, even though the county had no tax workoff funds available at that time. The county government has no central referral system for volunteers, and while a few (primarily human service) departments have large and well-organized volunteer programs, most departments have little or no experience with short-term workers of any type. The Tax Workoff program shows the potential of short-term workers, yet allows departments to require deadlines they might not meet with volunteer assistance.

Finally, the seniors benefit by getting an inside look at the government they pay for. They become participants, helpers, and anything but apathetic. Working as temporary employees of local government gives participants a new feeling about the local courthouse or city hall. Instead of the place to go pay your traffic fines, or appear in court, that building is transformed into the place filled with familiar, friendly faces doing important, but understandable work.

Since we will all, if we just live long enough, become senior citizens, it is in our own best interest to develop programs to serve our current seniors, and eventually, serve ourselves.

## HOW TO SET UP A SENIOR TAX WORKOFF PROGRAM

### I. Development

A. Lay Groundwork: Bring the idea for a Senior Tax Workoff program to your local Senior Advisory Board, Office on Aging, Community Action Agency, Senior Center--or

whoever is your local advocate for Senior Citizens. (If unions are important in your area, involve them.) Get them enthused, and let them present the idea to local officials (town council, school board, etc.). While you, as staff, should stay involved in all phases of the program, the value of an active, informed citizenry presenting the idea will not be lost on elected officials. You must have official sanction in order to develop the program. Especially in the first year, it is also helpful to have a specific budget amount or grant to work with.

Fort Collins started four years ago with \$2,500 budgeted for temporary salaries (as did the county). In 1985 the Larimer County commissioners approved a special fund of \$10,000 for at least 50 workers. This will double the size of the county program.

Administration can be placed in the personnel department, services for the aging, or even the Treasurer's office. With an involved advisory board, very little paid staff time may be needed. When the local school district began its tax workoff program, management was provided by two Senior Tax Workers with minimal supervision from school administration.

In Larimer County, the Department of Human Development administers the program, and has part of one paid staff person plus one Senior Worker to manage it. They prepare press releases, design the forms, recruit jobs, recruit applicants, refer and place, prepare reports and conduct the evaluations. This all takes a minimum of 40 hours in the fall to develop jobs; 40 hours in January to recruit applications and write the skills bank list; and 4 hours monthly the rest of the year to refer and evaluate.

**B. Get Support:** After you have the "go ahead" from the tax entity and a staff supervisor assigned, meet with the Finance or Treasurer's

office. The staff of these departments can actually make paying taxes a pleasant confirmation that working with local government is a positive, rewarding experience. Confusion here or hassles with the paperwork reduce the likelihood of Seniors continuing as volunteers after their workoff.

Learn how taxes are divided among local tax entities. Arrange how each district will pay the receiving entity or participant.

*Example: City of Fort Collins es-crows wages of senior workers until February 28, when the first half of taxes are due, then issues one check to Larimer County Treasurer for the entire list. Participants are notified by mail of the amount credited to their tax account, and can receive a check from the County Treasurer if their tax has already been paid by the bank or mortgage company. Agreements not to charge interest for late payment of taxes may be possible if the senior will be paid shortly after taxes are due. (Be sure to explore deadlines and penalties so that it does not cost the senior late payment fees.)*

*Larimer County pays workers directly, and instead of crediting to Tax Accounts, most Seniors go directly from picking up their check at their work station to the Treasurer's office, and endorse the check to their tax account.*

**C. Determine Program Guidelines:** Once you have agreed to do the program, and how to pay people, then decide specifically who will work and how to recruit them.

Eligibility guidelines in Colorado are age 60+ or being the spouse of someone 60+ for the county, and age 65 for the city and school programs. Applicants may work off the tax on their principle residence only, and only the amount applicable for each tax entity. Some people work for all

three programs, and work 40 hours (maximum) for the school district, and all the hours needed for city and county. In Larimer County, the county portion of the tax is 23% of the total tax bill; the City of Fort Collins is 10-14%; and the school district is 60%. We do not yet have programs for the City of Loveland or Estes Park.

There is no income limit, or means test, for the program. The City of Fort Collins has other rebate programs for utility costs for low-income seniors, and felt the tax workoff should be open to all. Some officials feared abuse by "wealthy" seniors, but this has not proved true. Average income is approximately \$10,500/year, with just a half dozen of the 73 applicants earning over \$25,000, and one over \$35,000.

Others worried that by limiting the program to low-income seniors we would limit the level of skills available. There have been, in fact, some opposite reactions--those with higher incomes have sometimes been offended by the low wage offered, and have instead volunteered. Those with the lowest incomes are most eager to work and willing to tackle a variety of jobs. According to Suzanne Jarboe-Simpson, City of Fort Collins program coordinator, limiting the income level might make the program sound like "welfare," an idea that would turn off many enthusiastic seniors who are adamantly opposed to charity but endorse the idea of "a day's pay for a day's work."

The Office on Aging Advisory Board provides informal evaluation and feedback on the program, and acts as a network to help publicize it through Senior Centers, interfaith groups, and neighborhoods. Public service announcements, posters, newspapers and cable TV coverage are all helpful.

In 1984 the county received 73 applicants and carried over 20 applicants from 1983 for a total of 93. The City of Fort Collins hires 30-40 workers a year; the school district

hires 25; Larimer County hired 30 in 1983, and placed 21 in 1984. This drop was due to the lack of a central fund for departments to use for temporary salaries. Yet, despite the budget cut, over 1/4 of the county departments found the program a good return for their limited dollars.

As the program grows, we are considering printing a recruitment message right on the tax notice for all homeowners. But first, we want to have more jobs ready so that applicants need not wait too long for their job.

D. Internal Promotion: Before recruitment, present the program at department head meetings and in memos. Get into budget planning early--as soon as the budget process starts. This may be six to nine months before you ever place a senior worker. Investigate departments that hire seasonal help such as county fair, grounds crews, and inventory. If you have been able to obtain a central pool of dollars, promote the availability of "free" help. If not, promote the cost savings compared to other temporary workers from what departments already have set aside for temporary salaries.

If at all possible, have seniors (either as volunteers or as their own workoff) contact department heads one-to-one to find out what kind of workers the department needs. (This can be done both before and after recruitment of applicants.) It is important that Seniors be involved in job development. This models, for other department heads, that senior workers are competent, and establishes trust between departments and the workoff program.

Develop jobs that accommodate the needs of seniors. Try half-day jobs, jobs that allow them to use public transportation to the job site, and jobs that eliminate common problem areas like reading fine print or lifting heavy loads. Note if the job requires climbing stairs or steady handwriting. Just as you would do

with developing volunteer jobs, find out which parts of the job are negotiable and which are absolute requirements.

Organize the job orders by the same categories as your skillsbank listings on the participant application form. If you have access to a computer, these two lists can easily be cross-referenced for ready referrals.

## II. Implementation

A. External Promotion: Start your recruitment publicity in early December. Because tax notices are sent in the second week of January, you need to get people's attention both before and after the holidays. Use posters, radio spots, newspaper stories, etc. Be sure to cover Senior Centers (a personal visit helps here), the Treasurer's Office (include special memos to all their staff), and RSVP offices.

Announce clearly when and where to apply and what seniors should bring with them: I.D. and their tax notice. We had twelve people waiting to apply half an hour before the office opened, and processed 73 applications in four half-day sessions, located in three locations throughout the county.

B. Taking Applications: To take applications, you'll need a building accessible to the handicapped, a quiet office, tables and chairs for interviewing, and access to a copy machine and a phone.

Have each senior fill out the application as much as he or she can while you make a copy of their tax notice. Review the application with them, and probe for skills they haven't listed. Seniors are notorious for under-playing any physical limitations. They also will not call themselves "disabled," but may have "a little trouble" with hearing, lifting, or printing. One retired janitor was referred to clean a county building, only to reveal he had heart problems that prohibited any lifting.

Find out if the taxes are paid by the senior or by a mortgage holder, and explain how the senior will be paid. If possible, keep the income and demographic data separate from the application--many do not like to tell you how much income they have.

C. Referral: Have your job descriptions available at the application site. If a job is available that calls for skills listed by a senior, make the referral immediately by calling the department and setting an interview time. Give the senior the referral form. Sometimes you may refer several seniors for the department to interview. Be sure to try to develop other jobs for those not hired after such procedures.

D. Hiring: Procedures are handled by individual departments if the money comes from their budget. If using a central dollar pool, have the managing department complete hiring and W-4 forms. Give the senior a timesheet and explain how many hours she or he will be paid to work. Departments return referral forms to the program manager after interviewing the senior. Several departments have requested the same senior workers to return if they apply the following year. This is a good barometer of a successful experience.

E. Termination and Payment: In Larimer County, the paying department submits paperwork for employee termination and orders a paycheck. Checks go directly to the department where the senior worked. Seniors are told by phone or mail their check is ready, if they do not come in to pick up their check. They go to the Treasurer's office and sign it over for their property tax, or get the check as reimbursement if taxes are already paid.

In previous years checks were issued in both the name of the Treasurer and the worker, and needed both signatures for endorsement.

This was cumbersome and since no senior had defaulted on payment of tax the practice was discontinued.

The program manager should work closely with the Treasurer to assure that all who work avoid paying late penalties if the job is completed after taxes are due, and should send reminder letters to those applicants not placed that they must pay in full by due date or incur penalties.

### III. Evaluation

Send a standardized evaluation form to each worker and to each supervisor upon completion of the job. Use this feedback to improve the program and to report to all applicants and supervisors just how well the program has gone. The evaluation form itself can be used to promote the idea of volunteerism after completing tax hours due.

Share the feedback information with the senior groups who help to start the program, and begin planning for the next year's program!

### IV. On-going Promotion--Skillsbank and Summary List

For those not referred immediately at time of application, list the available skills and highlight those that apply to specific departments. Send those to department heads. As two samples:

*Retired heavy equipment operator experienced with road and reverbed grading, age 67, available mornings, also experienced with loaders and large trucks.*

*Rancher, age 75, retired realtor, ranch cook, office manager; likes plants. (She was hired to help the receptionist at the District Attorney's office and they said their plants had never looked better.)*

Include the skillsbank list by category and number of people available.

Sample:

Clerical/filing	30
Typists	17
Management	6
Labor: Unskilled	21
Labor: Skilled - Carpentry	5
- Electrical	2
- Plumbing	2

Halfway through the year, remind department heads about people still available to work.

### V. Possible Pitfalls and How to Avoid Them

A. Income from the tax workoff is taxable by IRS. Tell seniors the limit of amount they can make without risk to lose Social Security or pension. Under age 65, a person can earn up to \$5160 a year; at age 65-69, the figure is \$6960; and over age 70, you can earn any amount without losing Social Security benefits.

B. Know deadlines for when tax is due without penalty. Make sure the seniors will finish work and get paid before they incur penalty, or make arrangements with the Treasurer in advance. In Larimer County taxes are due in full by April 30, or can be paid half by February 28 and the second half by July 31. Penalty interest then is charged until November, when the property can be sold at tax sales. If the debt is not paid in three years by the homeowner, the person who paid the taxes at the tax sale can apply for the deed to the property.

C. Be sure seniors know the limits of the job--when it ends and when they begin as a volunteer. Some departments continue to pay seniors for hours worked over the taxes due, while others invite the Senior to volunteer.

D. Market well in advance of recruitment, so jobs are ready and departments know to call you. Market all year.

E. Counteract the "no money for temporaries" line. If the department is currently using volunteers--see if there are jobs they cannot get volunteers to do, then rewrite these jobs as Senior Tax Workoff positions. Also, are there jobs undone (routine or backlog) or are there pilot projects with deadlines to be met that could benefit from extra help? Do they budget for sick or vacation staff time? They should!

F. Do not take many more applications than you have jobs. Keeping seniors waiting too long creates ill will and frustration.

G. Give yourself six to twelve months lead time from when the budget is set to develop the program.

### THE IMPACT ON VOLUNTEERS

The Senior Tax Workoff participants are not volunteers in the purest sense. However, the equivalent value of their work is well beyond the minimum wage that they are paid. The difference is therefore "volunteered" to the governmental entity, and could be considered services in-kind.

In some cases existing volunteers become Tax Workoff participants, then return to volunteer work in the same setting after completing their paid hours. This is a prized reward for volunteers and encourages a long-term commitment. Younger volunteers recognize the value of assisting the senior homeowners and have not shown any evidence of resentment of the financial benefit to the seniors. Within Larimer County settings, senior volunteers and Tax Workoff workers have not worked side-by-side, even though RSVP has placed over 50 Retired Senior Volunteers into county departments.

In some instances, two seniors have worked together although the job was very short-term and neither worked the full amount of their tax. More often, seniors remain as volunteers after they complete the tax workoff. The pay check allows the county to set deadlines and create an expectation of a defined perform-

ance level. The pleasure of performing a needed service keeps the seniors involved afterwards.

To my knowledge, no volunteers have been displaced by senior tax workers. There are still many more jobs than volunteers to fill them, and not all county departments utilize volunteers. In at least two cases, the opposite has been true: when departments ran out of funds for senior workers, they searched for volunteers to perform the job that had previously seemed "undoable." One RSVP volunteer and one high school distributive education student were able to fill these positions.

With the reinstatement of a central fund in 1984, the potential for displacement problems does exist. However, I anticipate that as departments discover the potential for short-term workers of many types, more job possibilities will be opened without friction between volunteers and tax workers. At least three departments report becoming more open to the idea of volunteerism since utilizing a Senior Tax Worker, and they are exploring and utilizing DUI (Driving Under the Influence) community service workers, RSVP and student volunteers.

The Senior Tax Program is growing both in size and popularity. Poudre R-1 School District in Fort Collins has expanded its three-year-old program from 25 to 50 participants. The Finance Director feels the seniors are extremely useful to the school administration offices, where all seniors have worked, and hopes to see the program expand into other kinds of services in the school buildings.

The City of Longmont in neighboring Boulder County is seriously considering initiating a Tax Workoff Program. The City of Fort Collins has an on-going commitment to the program, and administers it under the jurisdiction of their City Volunteer Director. And Larimer County's \$10,000 grant for 1985 shows a renewed promise to assist the older

homeowner in being an active participant in local government.

Neither the Senior Tax Workoff nor a comprehensive volunteer program can be substituted for the other, but for some Seniors and some departments the Tax Workoff opens the door to a satisfying volunteer experience.

## Appendix A

### PROGRAM DEVELOPMENT TIMELINE

#### January - Groundwork

Get support of Senior Board, Office on Aging.  
Present idea to local leaders.

#### February - Meet with Taxing Entities

#### March - Meet with Finance and Treasurer's Office

Develop payment process.

#### April - Assign Staff

Set up program eligibility guidelines and scope.  
Design forms and marketing strategy.

#### May through June - Submit Budget for Following Year

Promote to departments.

#### September through December - Develop Jobs

Contact department heads individually.

#### January

- 7 Tax notices sent out.
- 15-31 Recruit participants.
- 15 Begin placing participants in available jobs.
- 31 Catalog skills and market list to departments.

#### February - Begin Evaluations and Placements

#### March 1 - First Half of Taxes Due

Remind all applicants to pay first half of taxes.  
Pay taxes for those who have worked.

#### April 1 - Taxes Due if Paying Total in One Payment

#### June 1

Remind department heads of remaining applicants.  
Remind Seniors to pay second half of taxes.

#### July 1 - Taxes Due if Paying Second Half

Appendix B

LARIMER COUNTY SENIOR CITIZENS PROPERTY TAX WORKOFF PROGRAM  
APPLICATION FORM

Name: \_\_\_\_\_ Date: \_\_\_\_\_ Soc. Sec. #: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Age: \_\_\_\_\_ Sex:    M    F

Address of Property Taxed: \_\_\_\_\_

Amount of county tax for 198  : \_\_\_\_\_

\*Number of hours to work off (Tax ÷ 3.13=): \_\_\_\_\_

How are taxes paid \_\_\_\_\_ mortgage company or bank  
\_\_\_\_\_ by me, directly  
\_\_\_\_\_ other (explain): \_\_\_\_\_

Annual income (including Social Security): \_\_\_\_\_

SKILLS:

Former or current occupation: \_\_\_\_\_  
\_\_\_\_\_

Special skills and interests: \_\_\_\_\_  
\_\_\_\_\_

Do you have skills in any of the following?

Clerical	_____	Public Relations	_____
Filing	_____	Research/evaluation	_____
Typing--w/p/m:	_____	Counseling	_____
Graphic arts	_____	Data processing	_____
Management	_____	Maintenance	_____
Financial/Book-keeping	_____	Repair/Construction	_____
Engineering	_____	Teaching (Specify):	_____
(Specify):	_____		

Educational level: \_\_\_\_\_ High school \_\_\_\_\_ College

Do you prefer to work: \_\_\_\_\_ Indoors \_\_\_\_\_ Outside

Time available: \_\_\_\_\_ Half day \_\_\_\_\_ Full day

\_\_\_\_\_ M \_\_\_\_\_ T \_\_\_\_\_ W \_\_\_\_\_ Th \_\_\_\_\_ F

Seasonal preference: \_\_\_\_\_

Location preference: \_\_\_\_\_

Would transportation be a problem? \_\_\_\_\_

Do you have any physical or health conditions we should be aware of (trouble climbing stairs, etc.)?

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\*Applicants work at minimum wage of \$3.35 per hour minus F.I.C.A.

Larimer County will attempt to place tax workoff applicants into temporary jobs according to skills and date of application. This application is not a guarantee of employment.

Placement Information

Ref to: \_\_\_\_\_

Dept.: \_\_\_\_\_

Date: \_\_\_\_\_

HRS Completed: \_\_\_\_\_

Job: \_\_\_\_\_

Date: \_\_\_\_\_

*The following was the editorial of the January 14, 1983 The Coloradoan.*

## WE LIKE PROPERTY TAX WORKOFF IDEA

It's a good deal.

Senior citizens can pay their property taxes with time and talent instead of money.

Larimer County and the City of Fort Collins are accepting applications from seniors this month. The Poudre R-1 School District expects to be ready with its program soon.

Each program has different requirements, but the same intent. Each believes senior citizens may be short on cash, but long on talent. They will give you a job, and your pay will be applied to your tax bill.

"It's real work," said Lorrie Wolfe, volunteer director for the county Department of Human Development. "It's not a make-work proposition by any means."

Don't worry about being sent out to work with a road crew. The county tries to match jobs with your skills.

"We really do try to make it a match," Wolfe said.

Last year, 14 people worked off county property taxes. This year, the county has received more than 30 applications so far, Wolfe said. Some of the applicants are repeaters.

At least 25 jobs are available, Wolfe said last week. As more funds can be found, more seniors may be accepted in the program.

People in the programs work for minimum wage minus Social Security tax payments.

It took an average of about 22 hours last year to work off city property taxes, said Gail Woods, coordinator of volunteers.

"The caliber of work is terrific," Woods said.

The city has received 32 applications so far. Many are repeaters.

Seniors aren't the only repeaters. Woods said some city departments have requested help again this year

from the senior who worked with them last year. That is a reflection of the program.

The range of jobs available or done in the past offer challenges and capitalize on skills: computer work, microfilming, filing, painting, re-finishing picnic tables, courier duty, clerical work, carpentry and other trade skills.

Wolfe described the program as a "real good deal" for both the county and the seniors.

"We get all those years of experience," she said. And seniors ease the demand on their money.

Here's how to apply:

For the county program, you or your spouse must be 60 or older. Bring your 1982 property tax notice, personal identification and proof of age to the north lobby of the Larimer County Courthouse any Monday this month between 9 a.m. and noon. The north lobby is near the commissioners' office.

There is no income requirement; you don't have to be retired.

For the city program, you or your spouse must be 65 and you must own a home inside the city limits. Go to the personnel office upstairs (there is an elevator) in the new City Hall any weekday this month between 9 a.m. and noon.

Again, there is no income requirement. Some applicants are near poverty and others have incomes of \$30,000, Woods said.

Watch for the school district program announcement later. The district will take 20 seniors and give each 40 hours work.

There is nothing in the rules that prohibits qualified seniors from working off taxes in all three programs, Woods said.

That makes this good deal three times better. Take advantage of it.

# Strategies for Dissent and Advocacy

Marie Arnot, Lee J. Cary and Mary Jean Houde

Volunteer groups need not only to develop good action plans but also to consider the most effective strategies for implementing those plans. Let's assume that you have decided to take action on an issue. What is the best strategy for getting the support you need? Three options are available to you: the collaborative, campaign, or conflict strategy.<sup>1</sup> The choice of strategies depends primarily on the level of agreement on (1) the issue and (2) the way in which your group proposes to address the issue.

## COLLABORATIVE STRATEGY

The collaborative strategy is appropriate when a person or group wanting to make a change (called the "change agent") and the community, agency, or group to be involved in the change agree on (1) the issue, and (2) ways of dealing with the issue. When such agreement exists there is issue consensus. The change agent is a facilitator, stimulator, or catalyst. Those involved are open to ideas about the issue and ways of dealing with the issue and are confident that, by gathering information and communicating ideas, consensus can be reached. The collaborative strategy is probably the one we find most comfortable and use most.

## CAMPAIGN STRATEGY

The campaign strategy is appropriate when there is issue difference, that is when there is lack of agreement on (1) whether an issue

exists, and (2) how an issue is to be resolved. However, although differences exist, the assumption is that consensus can be reached. The person or group wanting to bring about change has preconceived ideas which have to be sold. Thus the change agent is persuader, campaigner, or convincer. The desired outcome is consensus, but if that is to occur, apathy or opposition must be overcome.

## CONFLICT STRATEGY

The conflict strategy is appropriate when there is issue dissensus, that is when there is complete disagreement on whether an issue exists and how the issue is to be resolved. There is a conflict between "us" and "them." Thus the change agent is a contestant working to have his or her side win. There are preconceived ideas about the issues and the way in which the issues should be resolved. Saul Alinsky, who taught how to use conflict strategy, gave the following three directives:

1. cut the issue
2. freeze the target
3. go to war

"Cutting the issue" means clearly identifying the issue about which there is conflict. Sometimes groups believe they strengthen their case by presenting a parade of horrors--a long list of grievances. A group is more effective when it clearly articulates what it wants to achieve, presents well-documented

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*Marie Arnot, Lee Cary, and Mary Jean Houde are the authors of The Grassroots Organization Book which will be published in 1985 by the Center for Volunteer Development at Virginia Polytechnic Institute. This article is excerpted from their manuscript.*

supporting evidence, and is persistent.

"Freezing the target" means identifying the enemy or opposition. Sometimes time is wasted and momentum is lost if a group fails to identify and deal directly with those who are on the other side of the conflict. It is also important, of course, to identify allies and to garner their support.

To "go to war" involves honestly facing being in a win/lose situation, and deciding to accept the risks inherent in conflict. It also means amassing resources and uniting in an all-out effort to win. The conflict strategy should not be used unless a group is committed enough to live with the consequences of its action--win or lose.

## CASE STUDIES

In reality the choice of strategies is often not so clear-cut. We may use elements of all three strategies in any given situation or we may use one and later another. For example if a group has used the conflict strategy and won, it may then make use of the campaign strategy in an attempt to restore unity.

Each of the following three case studies illustrates a situation in which one of the three strategies would be appropriate. The case studies are most useful as role playing experiences in volunteer training and should be followed by discussion.

### CASE STUDY 1

#### PLEASANTVILLE--THE COLLABORATIVE STRATEGY

##### A. Issue

A developer built and sold thirty new homes within a very short period of time in Pleasantville, a town of five hundred located about twenty miles from Capital City. Most of the homes were purchased by young couples who worked in the city. The Pleasantville Community Improvement Council wanted to develop a

project to (1) welcome the newcomers to the community, and (2) involve them in community life. After careful consideration of needs and goals they decided to sponsor a summer "Welcome to Pleasantville" program which would include the following objectives:

1. Invite the established residents of the community to be a part of visiting teams who would call on new families on a widely-publicized "Welcome to Pleasantville Night"--scheduled for June 15. Each team would present to the newcomers gifts or gift certificates provided by local businesses; a list of local services, prepared by the Business and Professional Club; and an interest-finder, telling of opportunities for involvement and service in the community and inviting newcomers to check the form indicating in what ways they would like to participate.
2. Hold a pot-luck "Welcome to Pleasantville" picnic on Sunday, July 17, in the village park.
3. Analyze the interest-finders with appropriate follow-up action by August 22.

##### B. Change Agent

Pleasantville Community Improvement Council. The role of the change agent is to act as facilitator, stimulator, catalyst.

##### C. Basic Elements in the Collaborative Strategy

Issue consensus; actual or potential consensus about the issue and how to deal with the issue.

##### D. Objective of Change Agent

To involve the total community in a summer program welcoming new residents and inviting their participation in community life.

##### E. Task

To carry out the plan of action.

The key to the collaborative strategy is that there is consensus on the issue. The community as a whole accepts the idea that new residents should be welcomed and invited to participate in community life. Furthermore there is consensus about the way in which the Improvement Council proposes to deal with the issue, i.e., planning a summer "Welcome to Pleasantville" program. Agreement on the issue and its solution is based on knowledge and communication. The collaborative strategy is consistent with the style of the Improvement Council and is compatible with the social environment of the community. Finally, the consequences are very likely to be looked upon favorably by the majority of the community's citizens. Thus the collaborative strategy is the best possible choice.

## CASE STUDY 2

### LAKESIDE--THE CAMPAIGN STRATEGY

#### A. Issue

For the past three years, a service club in Centerville has been active in dealing with issues related to Centerville's senior citizens. They have formed a close relationship with the Lakeside Residents' Council. Lakeside is a housing complex for senior citizens. Working together, the Residents' Council and the Service Club have not only been effective in obtaining improved services for senior citizens in Centerville, but also have sharpened public awareness about issues. At a recent meeting of the Service Club and the Residents' council, insensitive, patronizing attitudes toward the aged were discussed. Two specific instances were cited.

One of the Lakeside residents, an alert, attractive, vivacious woman of 83, fell and broke her hip and was taken to the local hospital. During her recovery she was in a great deal

of pain and under heavy sedation. For some years she had been troubled with bladder spasms, and as a result, needed to go to the bathroom promptly when a spasm occurred. Because of pain and sedation, it was difficult for her to find and turn on the light to summon the hospital attendant. In addition, hospital personnel did not always respond promptly to calls. As a result, one night she soiled her bed, for which she was scolded by a hospital employee. She was miserable, embarrassed and humiliated. Her roommate reported the incident to Service Club friends who came to visit.

The second specific situation concerning the group was the patronizing, condescending attitude of some of the therapists at Lakeside, especially those working with convalescent residents who took part in the morning exercise and awareness program in the solarium. The dialogue went something like this: "All right, folks. What day is it today? What month? What year? That's fine! And what holiday are we about to celebrate? Valentine's Day! Good, George. And what kinds of decorations do we put up on Valentine's Day?"--And so on.

Members of the Resident's Council and the Service Club were indignant about both situations. They considered talking to administrators with the objective of demanding that staff involved be fired. However, after further discussion, they determined that the issue they wished to address was attitude change.

#### B. Change Agent

Lakeside Manor Residents' Council and Service Club. The role of the change agent is to act as persuader, campaigner, or convincer.

#### C. Basic Elements in Strategy

Issue difference: lack of agreement on whether issue exists and lack of agreement on how issue is to be resolved.

#### D. Objective of Change Agent

To change attitudes of personnel at Lakeside and at the hospital so that senior citizens are treated with respect. (In developing a plan of action this objective would need to include specific answers to the questions: How much or how many? Within what period of time? With what results?)

#### E. Task

Develop a plan to achieve the objective using the campaign strategy.

The key to campaign strategy is that there is a difference of opinion about the issue. In this case it is assumed that hospital and Lakeside Manor personnel either do not know or do not care that their behavior is offensive and damaging to the self-respect of senior citizens whom they serve. The Residents' Council and the Service Club, on the other hand, want to encourage attitudes that reflect sensitivity and respect. Thus there apparently is lack of agreement that an issue exists. The Service Club and the Residents' Council will probably develop a plan of action involving education and persuasion, techniques used in the campaign strategy. The campaign strategy is consistent with the style of the Service Club and Residents' Council which have a history of working for improved services for senior citizens and for sharpening public awareness about issues. Their track record makes it feasible for them to risk the consequences of addressing this issue. Thus we would anticipate a successful outcome.

### CASE STUDY 3

#### JACKSON ELEMENTARY SCHOOL-- THE CONFLICT STRATEGY

The conflict strategy is appropriate when there is issue dissensus, that is when there is complete disagreement on whether an issue exists and how the issue is to be resolved.

There is a conflict between "us" and "them." Thus the change agent is a contestant.

There are preconceived ideas about issues and issue solutions and the outcome of the strategy is that one or the other side is expected to win. The following case study illustrates the conflict strategy.

#### A. Issue

The Board of Education in Metroville has made a decision to close Jackson Elementary School. The Jackson PTA and the Jackson Neighborhood Association are unalterably opposed to the Board's decision.

Enrollment in Jackson Elementary has been declining for several years. Present school population is 250. The building is old and needs repair. It is located at the intersection of two busy streets. The Board maintains that decreasing enrollment, increased energy costs, and a seven percent property tax lid have made the cost per pupil too high to justify keeping Jackson Elementary open. The PTA rejects the way in which the Board is computing energy costs. Furthermore the PTA and the Neighborhood Association contend that a substantial grant in Community Development Block Grant funds to be spent in the neighborhood will decrease out-migration and increase population. They also argue that, because of escalating housing costs, first-home buyers, who tend to have young families, will seek older homes in the neighborhood.

Several months ago the Board formed a Committee of One Hundred to establish criteria for closing neighborhood schools. After meeting for several weeks the committee recommended that no schools currently under consideration be closed. The Board contends that the committee didn't really understand the financial situation.

Board members are elected at large. The Board is very cohesive and supports the Superintendent, an able, ambitious man. The Board be-

believes they have bitten the bullet and they are willing to accept the consequences. They contend that they are not denying the neighborhood a school in that another elementary school is located a little less than a mile from Jackson.

Recently the Board announced its decision to build an elementary school in Valley Home, a new subdivision in which population is expanding. The Jackson neighborhood was incensed, accusing the Board of fiscal irresponsibility and favoritism.

The Superintendent and the Board would like to let the storm blow over and avoid further confrontation with the Jackson neighborhood. However in a recent editorial one of the two daily newspapers has accused the Board of being insensitive to neighborhood needs and not listening to citizens' points of view. In addition The Metro Neighborhood Coalition has just issued a statement championing the Jackson group's cause. (The Coalition director was trained in the conflict model and welcomes controversial issues as a means of keeping the Coalition alert and active.) The PTA, the Neighborhood Association, and the Coalition have joined forces and demanded a special meeting with the Board. Reluctantly the Board has agreed. The meeting is scheduled for 2 p.m. Friday in the Board room at the Public School Administration building.

#### B. Change Agent

Jackson PTA and allies. Role of the change agent is to act as contestant; work to have own side win.

#### C. Basic Elements in Strategy

Issue dissensus--complete disagreement on whether an issue exists and how an issue is to be resolved.

#### D. Objective of Change Agent

To cause the Board to rescind its decision to close Jackson School.

#### Objective of Board

To stand firm on its decision to close Jackson School.

#### E. Task

Develop a plan for achieving the objective, using the conflict strategy.

The key to the conflict strategy is that there is no consensus about the issue. The Jackson PTA and its allies are at loggerheads with the Board of Education and the issue cannot be resolved by using the collaborative or campaign strategy.

Before making a decision to use the conflict strategy the change agent should consider the risks very systematically, perhaps by using the Risk Technique or Force-Field Analysis and be prepared to accept the consequences. In addition the group should prepare carefully for the confrontation. It is necessary to clearly state the issue and stick to it. This means planning who is going to say and do what. It also means not permitting the other side to cloud the issue by diverting attention to other matters or going off on tangents. However it is also important to plan an up-front and a fall-back position, i.e., a clear and assertive statement of what you want, but also a quiet agreement among your own group as to what you will settle for. This allows room for negotiation.

One author suggests four additional considerations: (1) separate the people from the problem, that is discuss issues, not personalities; (2) focus on interests, not positions, that is, try to relate the conflict to basic human interests and needs, and try to discover interests both sides share; (3) invent options for mutual gain, in an effort to create a situation in which everyone wins something; (4) insist on objective criteria, which enables negotiation on the basis of principle, not pressure.<sup>2</sup>

If your group has chosen to use the conflict strategy and has been successful, it may be very wise to consider how best to restore a good relationship with the other side. Chances are that the campaign and collaborative strategies may be useful approaches in future relationships.

## SUMMARY

The collaborative strategy is appropriate when there is issue consensus; the campaign strategy when there is issue difference; and the conflict strategy when there is issue dissensus. In choosing a strategy a group must also consider its own style, the social environment in which it functions, and the possible consequences of its choice.

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<sup>1</sup>The basic ideas about the collaborative, campaign, and consensus strategies have been adapted from: Warren, Roland L., Truth, Love, and Social Change, and Other Essays on Community Change. Chicago: Rand McNally and Co., 1971.

<sup>2</sup>Citizen Participation Newsletter, December, 1982, No. 16 (Morgantown, West Virginia: West Virginia University Cooperative Extension Service, 1982) pp. 1-3, citing Fisher and Ury, Getting to Yes (Boston: Houghton Mifflin, 1981).

# Professionalism in a Medical Volunteer Role: Volunteers in Emergency Squad Work

JoAnn Gora, PhD and Gloria Nemerowicz, PhD

*Editor's Note: The following is the official "Executive Summary" of a several hundred page study which will be published in book form in 1985.*

## INTRODUCTION

Volunteers save the taxpayer money, relieve labor shortages, extend services, develop necessary social programs, promote changes within existing organizations and provide links between the community and service agencies. The Gallup survey taken in 1981 indicated that 53% of all Americans did some volunteer work in the preceding year. This survey concluded that 93 million Americans volunteered their services, and these services were valued at \$64 billion. In the health field the value of volunteers is measured not only in dollars, but also in terms of lives saved or lost. Volunteers provide emergency services, staff hospices, hotlines, and crisis centers, and fill personnel gaps throughout the hospital system. The largest concentration of volunteers in the health field in New Jersey is in ambulance squads. Ninety-two percent of ambulance squads in this state are non-profit, volunteer operations. These 560 squads represent 15% of all first aid volunteers in the United States. These emergency squad volunteers are the subject of this research.

## THE RESEARCH PROBLEM

The contradiction between the popular image of the volunteer as a nonserious worker and the sociological image of the volunteer as a committed worker bears on an important question: how much can we expect from the volunteer? How accountable can we expect him/her to be? These questions can be answered in part by examining how volunteers define the work they do. The sociology of work emphasizes the importance of the concept of professionalism in differentiating among various kinds of work. This study is an attempt to understand professionalism--the extent of it and the conditions under which it develops--in volunteers. If volunteers are accorded professional status, mechanisms of internal control should operate to uphold standards. Typically, in professions, these are peer review and evaluation, improvement or recertification measures. In addition, if the volunteer is viewed as a professional, the increased prestige will make recruitment and retention easier.

One prerequisite for professionalism is the commitment by practitioners to a specific ideology. That is, the workers must believe that the characteristics of a profession apply to the work they do. That is where this research starts, namely, to determine if these practitioners (volun-

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teer emergency workers) hold a professional definition of this work (emergency squad work). We seek to distinguish those who do from those who don't.

#### PROFESSIONALISM DEFINED

What are the characteristics of professional work? In this research, we use the definition developed by George Ritzer (1977). He notes that professional work has six characteristics:

1. General, systematic knowledge. Professional work is thought to be based on specialized, technical information which requires an extensive learning process and which can only be taught by practitioners.
2. The norm of autonomy. The work is believed to require independence from outside interference. Only peers/colleagues are capable of setting standards, regulating and sanctioning job performance. A standardized code of ethics, developed by the profession, guides the work. Judgments by members of the profession are assumed to be expert.
3. The norm of altruism. A service ethic dominates the work. Professionals are primarily concerned with the welfare of those they serve. This client orientation is thought to be the result of an altruistic interest in the well-being of the larger community. This orientation, in part, results from the special "calling" that professionals feel to do their service-oriented work for others.
4. The norm of authority over clients. In order to best serve their clients, professionals generally insist on complete authority over those they serve. Thus professional occupational roles have a good deal of authority built into them.
5. A distinctive occupational culture. Professions develop occupational subcultures which include all people who do the same pro-

essional work. This subculture is supported by formal organizations, associations, or societies which often function to create a sense of national unity and identification among professionals in the same occupation. These sub-cultural organizations often function as a lobby group for the occupation. Professional work is marked by special norms, values, beliefs and symbols which set the occupation apart from mainstream society and promote a sense of community and common identity among members.

6. Recognition by the community and the law that the occupation is a profession. Professions are granted the power of autonomy and authority by the larger society. With this recognition often goes trust or faith in the altruism and the ability of the professional.

These characteristics may not objectively describe the work but, sociologically, what is important is how people perceive both the job and the people who do the job. If the job is to be seen as a profession, it is important that the workers, themselves, believe that the work contains these "professional attributes."

The purpose of this research is to answer two questions: do emergency squad volunteers hold a professional definition of their work? Under what conditions does this attitude of professionalism develop? In the course of answering these two questions, we also discuss who does this type of volunteer work, why they do it, their attitudes toward it, how they organize as a group to deliver the service, and the support systems they rely on.

#### RESEARCH METHODOLOGY: THE SAMPLE AND THE INSTRUMENTS

From a list of all volunteer emergency squads in New Jersey, a geographically-stratified random sample of 21 squads was selected. Thirteen

of New Jersey's 21 counties were represented in the final sample. A pilot study allowed us to pretest and revise the following research instruments: a structured questionnaire, a job satisfaction scale, a professionalism scale, and a focused interview schedule. The self-administered structured questionnaire that was completed by the individual volunteers elicited data on: the number of years on the squad, hours worked per week, extent of mobility within the squad, most frequent kinds of calls of the squad, necessary skills, training, nature of complaints, reasons for volunteering, reasons for entering the volunteer role, unanticipated benefits of volunteer work, extent of support from family and friends, quality of relationships with squad members. The questionnaire also elicited data on the demographic variables of sex, age, marital status, number of children, age of children, residence, education, occupation, income, and involvement in other organizations.

The professionalism scale, derived from the work of George Ritzer, asks the respondent for extent of agreement with eight statements measuring the following distinguishing characteristics of professional work: altruistic motivation, a systematic knowledge base, adherence to a code of ethics, need for autonomy, need for authority over clients, and the existence of an occupational subculture. These questions have content validity; a pretest established the concurrent validity of the scale. Scores derived from this scale are used to measure both the individual's and the squad's level of professionalism.

The job satisfaction scale was adapted from one developed at the University of Michigan Institute for Social Research by Quinn and Staines that was used in a Department of Labor survey of a national sample of workers in 1969, 1973 and 1977. The scale taps the following specific dimensions of job satisfaction: com-

fort, challenge, relations with co-workers, and resource adequacy. Job satisfaction is measured by the individual's degree of agreement with 13 statements.

A focused interview schedule was used to conduct interviews with squad leaders. It was from these interviews that information about the organization and structure of each squad was derived. Information on the following variables was collected: size of squad, sex composition of the squad, history/age of the squad, geographical area covered, nature and frequency of calls, vehicles owned by the squad, size and condition of physical plant, shift organization, responsibilities of members, admissions procedures, disciplinary procedures, recruitment methods, financial condition and sources, committee structure, leadership structure and turnover, extent of social activities of the squad, extent of in-house training, and community relations.

This research has both qualitative and quantitative elements. The focused interviews and open-ended survey questions produce qualitative data that describe the work experience of the volunteer squad member and the organization of the squad. These data complement the quantitative data generated by the other research instruments.

There are two levels of analysis: the individual (the volunteer) and the organization (the squad). Since the independent variables are at both the organizational and individual level, we review the characteristics and attitudes of the 514 emergency squad volunteers and the organizational structure of the 21 squads. These variables are used to predict the dependent variables of professionalism and job satisfaction.

Standard multi-variate analysis with appropriate tests of significance and measures of association establish the degree of statistical and substantive significance between the independent and dependent variables.

## THE INDIVIDUAL VOLUNTEER: CHARACTERISTICS AND ATTITUDES

Based on the demographic data we conclude that our "typical volunteer" is a married man between the ages of 18 and 35 with children over the age of seven. He is a high school graduate with some college education who works full time and earns less than \$30,000 per year. He lives in the town in which he volunteers and has been involved in voluntary organizations in the past. Contrary to some popular images of the volunteer, our findings show that the volunteer is not a person who "has nothing better to do with his time." Volunteers are people who are firmly rooted in the community, tied in through involvement in organizations and through their families.

Most of our volunteers have served on a squad for less than four years and devote at least 15 hours per week to this activity. Many squad leaders report that they can only expect a commitment of three to five years from the typical volunteer, since "burn-out" occurs for many volunteers after five years. Despite the public's image of the dramatic, life saving efforts of the emergency squad volunteers, most respondents reports that fewer than 10 percent of their calls can be considered life saving. Few volunteers report that their volunteer work consists primarily of saving lives. Interestingly, the volunteers realize that their most important skills are not their medical skills. They feel that it is important to reassure and control people in an emergency situation and for this they rely on interpersonal skills.

Generally our volunteers feel that their training has been very good, and many of the respondents have gone for additional training. The squad members seem to be eager for more in-squad drills. Additional formal courses are not considered to be as important as continuous in-squad drills. The volunteers seem eager to

review calls, to improve techniques and procedures, and to discuss with other volunteers how to maintain and improve their emergency squad skills. The respondents are not eager to have fewer restrictions placed on the services that they perform. They are afraid that fewer limitations will reduce the number of people who can do the job or that it will change the role too radically. They do feel, however, that those people who have specific medical training should be allowed to use that training in their role as volunteers.

While the volunteers have few complaints about the nature of the work, they do complain about a lack of significant recognition from the communities they serve. The other complaint mentioned with any frequency is problems with co-workers. These are typically defined as "personality clashes" that, while annoying and unpleasant, are overcome when the squad members go out on a call.

Our data emphasize the overriding importance of the informal channels in the recruitment process. It is through friends, neighbors, and relatives that volunteer work is "demystified" and made inviting. Often it is a personal experience with a squad that allows people to imagine themselves as emergency squad workers. In overwhelming numbers, the respondents cite serving the community as their most important reason for volunteering. The second motivation for doing volunteer work is an instrumental one. Respondents indicate that they think this volunteer work might help them in their job or future career. Good feelings about themselves, new friendships and a sense of personal growth are cited as unanticipated benefits.

Those people who don't do this volunteer work are not seen as people who lack the skills to do the work. Rather they are seen as people who live busy lives and do not know enough about this work to understand how interesting and rewarding it is. All of the reasons cited by the volun-

teers, that is, all the excuses for not volunteering, are amenable to change. Potential volunteers can be educated to understand that volunteers are also busy people, that volunteer work is intrinsically interesting, and that there is little to the volunteer work that is frightening.

Our volunteers report a strong sense of support from their families and friends. Families support volunteers even though there is some recognition that this activity interferes (time and emotional costs) with family and/or job responsibility. In addition, our volunteers have a reference group of volunteers, friends who share a common interest in volunteering even if in an area other than emergency squads. The squad itself becomes, for most volunteers, a primary group. Like friends and family, squad members socialize, reward, and sustain the volunteer in his or her volunteer role.

Volunteers have a difficult time comparing this work to paid work because they see their volunteer experience as intrinsically enjoyable. The volunteers reflect a commonly held view that work is something you do because you have to. This view of work contrasts sharply with their view of volunteer work. Volunteering is work done by choice and is intrinsically enjoyable.

#### SQUADS: THEIR STRUCTURE AND CHARACTERISTICS

The 21 squads are all voluntary organizations which have the same stated goal: responding to the emergency medical needs of an immediate population. How they organize to reach that goal varies tremendously. Our intensive interviews allow us to point to 20 variables that describe the squad organization. Nine of these 20 variables emerge as the most significant in differentiating the squads.

Extent of Activity: Our sample ranges in size from a squad of 17 to a squad of 65 active members. Most squads have between 25 and 45 mem-

bers. The number of calls a year range from 198 to 5,500. Our largest squad is not the most active squad because it is in a suburban community. The most active squad is in an urban location. Many squads are sensitive to the importance of activity for retaining members. Several squads have a cap on the number of members fearing that too many members will lead to less activity and thus to dissatisfaction. Volunteers, perhaps more than paid workers, desire to be active on the job because it is the activity, not a paycheck, that is the reason for being there.

Recruitment: One-third of the squads maintain that they have no problems with recruitment because they do not want any more members than they currently have. At the other extreme, for four of the squads recruitment problems are so severe that they have affected the ability of the squad to provide 24 hour coverage. Although most squads send out an annual recruitment letter to the community, leaders report that the most popular and successful method of recruitment is "word of mouth." This informal method promotes group solidarity by recruiting outsiders who are already known to someone in the group. It may be that personalized recruiting is necessary to demystify emergency medical work. Recruitment methods also include talks to local organizations, ads in the newspaper, and sponsoring first-aid courses in the community.

Financial status: Operating budgets range from \$10,000 to \$100,000 per year. Squads receive funds in varying proportions from local municipalities, fund raising letters, door to door solicitation, unsolicited donations, and a wide range of fund raising activities. A small percentage of the squads indicate severe financial problems. Those that report poor financial conditions also report a poor relationship with the community they serve. It is this connection between community

recognition and fund raising that makes squads eager for media coverage of their activities.

Relationship with the town: All squads distinguish recognition and approval from community residents from recognition and cooperation from town officials. Generally, squads feel that town residents are grateful for their efforts, although they do not always realize that the squad is unpaid. The squads are concerned about the extent of services they receive from the town (for example, snow plowing, equipment repair). No squad feels it gets sufficient newspaper coverage.

Shift organization: Squad leaders report that calls can be responded to in three ways: a scramble or a designated crew that responds either from home or from the squad house. The method of coverage usually reflects the availability of members. Most squads have difficulty with fixed shifts during daytime hours when most of their members are at work. Squads report that the women who used to cover the daytime hours are no longer available. There are indications that squads that rely on the "scramble" have problems coordinating their efforts so that a sufficient, but not excessive, number of members arrive at the emergency scene with the ambulance.

Leadership: By and large, the squads have established democratic procedures for nominations, elections, and the development of rules and regulations that guide activities. However, a range of democratic forms has developed. Some squads, though democratic in procedure, are practically leaderless, even though someone gets elected. The leader has very little designated authority. In other squads the leader has been designated a lot of authority, and he/she uses it to run the squad effectively. In a few squads, the personality of the leader dominates. Some leaders appear to be "benevolent despots," that is, strong leaders who attempt to create a family

atmosphere while they play the automatic parental role. There are a few squads that have had the same leaders for ten to fifteen years, either because the squads are very small and few people will accept the responsibility or because the leader is one of the oldest members of the squad, has a great deal of power, and does not wish to relinquish this role. A few squads have recently experienced a change in leadership and are quite conscious of leadership problems in the past.

Sociability: Squads range in extent of sociability. Some squads serve as a home away from home where people spend a great deal of time. Some have planned activities but not a great deal of informal socializing. In others, socializing is discouraged or not facilitated. It is clear that in some squads the organization of the squad does not induce or encourage sociability among members. For example, these squads are organized on a scramble system, do not have a squad house, have a weak leadership structure, and have the greatest turnover problems.

Role responsibility: There is wide variation in what leaders' expect from their volunteer members. Some leaders feel that all responsibilities are really optional and therefore are reluctant to make extensive demands on their members to attend training or business meetings or even to answer a minimum number of calls. It is the smallest, least active squads, usually organized on a scramble system, that are most likely to make the fewest demands on their members. Most squads require members to serve a minimum number of hours per week and to attend business and/or training meetings (from one to four meetings per month). Most committee assignments are optional but encouraged. In at least five squads extensive participation in fund raising activities is also required.

Bureaucratic structure: The formal organization of the squad consists of the number of leadership

positions, the number of committees, admission requirements, procedures for transition from probationary to active status and the extent of in-house training. There is great variation in the structure of the squads on all of these criteria.

### TYPOLGY OF SQUADS

Combining bureaucratic structure and role responsibility, squads can be ranked on an organizational continuum from high to low. The highly structured group consists of squads with extensive role responsibilities, numerous committees, a complex leadership structure and exacting training requirements. Interestingly, these squads have a democratic leadership style and are high on sociability. At the other end of the continuum are squads that make few or no demands on the members, have few committees and little or no in-house training program. These squads tend to have a more autocratic leadership and less leadership turnover.

Through the description of four squad types we analyze the way the nine organizational variables described above fit together to form working wholes. The "ideal types" described below are composite pictures, not precise descriptions, of any individual squad.

The highly structured squads have an extensive formal bureaucratic structure of rules and regulations that guide the squads' activities. There is an extensive committee structure, strong democratic leadership and no financial problems. Training meetings are scheduled every week to enable members to improve their skills. Squad members are very professional in their stated ideology. They frequently use the word "professional" to describe themselves. They emphasize the amount of training they give their members and their extensive "exclusive" admissions procedures. At least part of what they mean by professionalism is being serious about their work.

These squads do not encourage social activities among members and, in fact, socializing is seen as a potential problem. The membership of these squads includes people of all ages and socio-economic backgrounds. These squads tend to draw from large and somewhat heterogeneous communities. There is great crew-level loyalty that is defined as an important ingredient in doing a professional job.

The community squads are very tight knit with a stable membership. They have few financial problems and enjoy a good relationship with the town. They have a tradition or history in the community that is widely known and cherished. There is a real sense of being appreciated by the community. The members are drawn from the small community they serve. The membership is homogeneous, sometimes young, and people enjoy spending time together both in the squad and in outside social activities. There is some tendency in these squads to identify discipline and control as problem areas. These problems are usually defined by the age of the members and the social activities in which they engage. These squads tend to be concerned with their appearance and their image in the community.

The struggling squads tend to be loosely structured with few rules and regulations. Training requirements are kept to a minimum, and there are few drills. These squads have financial troubles and very real survival problems. They are trying to become close to the community, but at this point they are not. The membership is not very tightly knit. Relationships between people are loose, not very social. In addition, these squads tend to have recruitment problems. The leadership is either weak or very new at the job. These squads tend to make little use of their squad house. Members respond to calls, primarily from home, not from the squad house. This, in part, reflects their low degree of identification with the squad as a community of volunteers.

In our sample, this kind of squad was the most frequent.

The authoritarian squads do not have many rules or an extensive bureaucratic structure, but they are distinguished by clear leadership roles. These squads tend to have very strong leaders who hold their positions for a number of years and who rule without a lot of regulations to guide them. The emphasis is on authority, not on roles and regulations. The power of the person in the leadership role is emphasized. These leaders tend to work hard for the good of the squad, and they engender devotion or, at least, respect from most of the members. Members express a sense of commitment to the squad, which is primarily commitment to the leader. This leadership pattern can produce a very tight knit squad. In some cases there is a very strong in-group feeling among squad members. Training requirements tend to be loose. Street experience is seen as more important than "book learning" or formal training. Discipline is generally rigorous in the hands of the authoritarian leader. Some squads in this group have good relations in the town, some do not. The relationship with the town, like everything else in these squads, is a function of the leadership.

There is a correlation between degree of formal bureaucratic structure and social class, as measured by income or occupation. That is, volunteers in the highly structured squads have a higher median income and are more likely to hold professional/managerial occupations than are volunteers in the authoritarian squads. These data suggest that people use, in their volunteer work, the organizational skills that they have acquired in their occupations. The community squads and the struggling squads are not defined by their degree of bureaucratic structure, the social class of their membership, or by their attitude towards professionalism. Rather, they are characterized by their relationship with the

towns they serve, their financial problems and their recruitment dilemmas, all of which are inter-related.

Our data suggest the following conclusions:

1. *The highly structured squads operate smoothly and have developed internal mechanisms of quality control. They serve the community, and local residents respond to fund raising and membership appeals.*
2. *The community squads are small, but well respected by the town and presumably stable in their ability to deliver services.*
3. *The struggling squads cannot rely on local fund raising efforts for their survival. If they are to function effectively, they will need to find new financial supports.*
4. *The authoritarian squads function well where the leadership is wise and benevolent. Then they serve the community well and are respected and appreciated. When the leadership is isolated from community influence, the squad may deviate from appropriate community service. Then the municipality needs to be in closer cooperation and control in order to assess and monitor service delivery.*

#### CORRELATES OF PROFESSIONALISM

Originally, we hypothesized that professionalism would be influenced by the type of squad organization. However, our data indicate that there is no correlation between degree of formal bureaucratic structure of the squad and professionalism. That is, the highly structured squads as a group don't score higher on professionalism than the authoritarian squads. In fact, there is very little variation among the squads in professionalism as measured by the median or mean professionalism score of the squad's membership. We conclude, therefore, that profes-

sionalism is an individual-level variable.

Overwhelmingly the volunteers as individuals agree that their emergency squad work is marked by professional characteristics. Ninety-two percent of the respondents agree that "there is a distinct body of knowledge required to do this work." Ninety-two percent agree that "there is a code of ethics that guides the work." Eighty-four percent agree that "there is a national or state association of people who do this work." Seventy-nine percent of the respondents agree that people who do this work are a rather select group with a certain "calling for the work." Seventy-four percent agree that "people who do this work are generally altruistic, concerned with the well-being of others rather than themselves." Sixty percent agree that "many of my good friends also do this work." Fifty-six percent agree that "only someone who actually does this work can teach it to others." Fifty-one percent that "to do this work right, I need authority over those I serve."

The data are analyzed to determine the variables correlated with professionalism and to gain a better understanding of the conditions under which professional attitudes develop. The following variables are explored: occupation, income, education, years on the squad, number of hours worked, family's knowledge of work, family's reaction, age, sex, motivation, benefits, training, relationship with squad members.

The most dramatic relationship is an inverse one between occupation and professionalism. Blue collar workers and sales and clerical workers are more likely to score high on the professionalism scale than are professional and managerial workers. Alternately, professional and managerial workers are more likely than any other occupational groups to score low on the professionalism scale. Perceiving emergency volunteer work as professional is, at least in part, dependent on the individual's

occupational frame of reference. If the individual's job does not manifest the characteristics of professionalism, as defined in this study, he/she will be more likely to maximize a definition of this volunteer work as professional. Professionals and managers in comparing their paid work with this work do not find volunteer work "professional." They do not accord it the same status as their paid work. It is more likely to be the blue collar or sales and clerical workers who attribute the positive characteristics of professionalism to this volunteer work.

The relationship between occupation and professionalism is supported by the data on income and education. Years on the squad is a contributory factor in explaining professionalism; its influence varies by occupation group. That is, after ten years on the squad there is an increased chance that those in managerial and professional occupations will score high on the professionalism scale. Those volunteers from blue collar and sales occupations are more likely to score high on the professionalism scale after a shorter time period on the squad.

Additionally, we see a positive relationship between hours worked per week and the professionalism score. Does the behavior (number of hours worked) produce the attitude (defining the work as professional) or does the attitude produce the behavior? The data do not indicate which factor is the independent variable.

Those respondents who report that their families know what they do in their volunteer work are more likely to score high on the professionalism scale than those respondents who report that their families know very little or nothing about their volunteer work. In addition to family support, close warm relationships with other squad members are also associated with high scores on the professionalism scale. The data document a positive relationship between the volunteer's perception of

his/her relationship with other squad members and the definition of the work as professional.

In sum, it is clear that the person most likely to score high on professionalism is an individual who is a homemaker or is in a blue collar, clerical or sales occupation, who has a low income, less than a college education, who has been on the squad more than four years, has a warm relationship with squad members, and has a family who knows about and supports volunteer work.

Interestingly, a professional definition of the volunteer work is not correlated with age, gender, initial motivation to do the work, desire for more extensive training, or desire for fewer restrictions on the services squad members can perform.

#### CORRELATES OF JOB SATISFACTION

For the past several years the United States Department of Labor has pointed to a decline in job satisfaction in the American labor force. The University of Michigan's surveys document this decline. In these surveys, workers are asked a series of questions about specific aspects of their job. We ask those same questions of the volunteers. On eight of the thirteen statements the volunteers are more satisfied than workers in the American labor force. A higher percentage of volunteers than paid workers indicate agreement with the following statements: the physical surroundings are pleasant. The work is interesting. I have an opportunity to develop my own special abilities. I am given a chance to do the things I do best. I am free of the conflicting demands that other people make of me. I am secure in my volunteer position. I have enough information to get the job done. My supervisor is competent in doing his/her job. There are five items that elicit some measure of dissatisfaction. The volunteers do not strongly agree with the following statements: The hours are good. I

am free of conflicting demands. I am given a lot of freedom to decide how to do my own work. I have enough authority to get the job done. My chances for advancement are good.

The strongest predictor of job satisfaction is holding a professional definition of the volunteer work. The two scales, professionalism and job satisfaction, are positively correlated. Volunteers who define this work as professional are more likely to also define the volunteer work as a satisfying experience on a number of dimensions.

#### IMPACT OF YEARS ON SQUAD

We were interested in determining whether newer volunteers have different attitudes and different levels of job satisfaction than more experienced volunteers. Since the relationship between years on the squad and professionalism is a weak one, it is possible to say that people do not grow into an attitude of professionalism, but come already prepared with the "right orientation." If new members do not see this volunteer work as professional when they join, they are unlikely to acquire this perception over time. Additionally newer members are just as likely as more experienced members to say that their families have a positive reaction to their volunteer work.

Although high levels of satisfaction are found among all volunteers, newer members are more satisfied with the hours, more positive about the physical surroundings, less likely to recognize conflicting demands being made on them, more likely to endorse the idea that they can develop their own special abilities through volunteer work, and more likely to feel that there are chances for advancement within the volunteer organization. Thus we see that the new volunteer begins with a very high level of satisfaction. This is understandable given the element of choice involved in being an emergency squad volunteer. Those who stay with volunteering do not experi-

ence a significant decline in levels of satisfaction. They may become more critical of the conditions of the work, but, at the same time, they become more secure in their ability to get the job done.

## POLICY IMPLICATION

The last chapter of this report discusses the policy implications of these research findings as they relate to the issues of recruitment, retention, and increased professionalism among volunteers.

### To Aid Recruitment

1. The individual who volunteers is one who has a very strong sense of identification with the community in which he lives. Thus, it is important to develop a sense of community among town residents which, in turn, will foster volunteerism.
2. Informal recruitment is more effective than formal recruitment methods and therefore should be emphasized. The informal approach (primarily word of mouth) seems to bring in "the right people" with "the right attitudes" and encourages warm relationships between the new volunteer and those already on the squad.
3. Formal recruitment methods (door-to-door canvassing, annual letters to the town, talks to community organizations) are important primarily as a way to educate the public to the existence of the squad and the dedication of its members.
4. Emergency squad volunteers emphasize the importance of interpersonal rather than medical skills. Recruitment and training efforts should not neglect these skills.
5. The gender, age, and initial reason for volunteering are insignificant in terms of the attitude of the volunteer toward professionalism and should not be emphasized as criteria for admissions.

6. Public relations campaigns should educate the public to the unanticipated benefits and rewards of volunteering. The public needs to know that the work is neither difficult, frightening, nor boring.

### To Aid Retention

7. Governments--local and state--should recognize the monetary value of squad services and their need for financial support. They should help with direct financial aid and support services.
8. Volunteers need and want responsibility and activity. Squads should consider capping their membership levels so that each volunteer feels necessary to the operation of the squad.
9. Since volunteers see the most value in in-house rather than formal course training, squads should provide regularly scheduled opportunities for a review of calls, procedures, and equipment.
10. Squad members should not be fearful of using the squad house as a place to congregate and to hold social gatherings. Social activities among squad members encourage strong supportive bonds which are necessary in this type of work.
11. Most volunteers have a "volunteer life" of approximately five years. Burn-out is a phenomenon that should be anticipated.
12. The major source of dissatisfaction and low morale in volunteer work is inadequate community support and recognition. Many times lack of support is attributed to lack of information about the squad and/or the voluntary nature of the organization. Local governments should recognize the importance of positive recognition and should extend courtesies whenever possible to encourage and support volunteer activities.

### To Foster Professionalism

13. Volunteers from lower socioeconomic occupations are the ones most likely to derive intrinsic rewards from volunteer work and to define it as professional. Volunteerism among lower socioeconomic groups should be encouraged.
14. Those individuals most likely to define the role as professional are also most likely to show a high degree of satisfaction with the work. Therefore, a professional definition is to be encouraged if only because it leads to high levels of job satisfaction and commitment to the work.
15. The organizations that volunteers create differ significantly in their degree of bureaucratic structure and leadership style. There are a variety of apparently successful types of squad organizations. Organizational structure does not seem to influence either degree of professionalism or job satisfaction.
16. Finally, our theoretical model of professionalism suggests that professionalism can be fostered by 1) emphasizing the solid base of information upon which the technical portion of emergency squad work is based, 2) allowing the volunteers to work free of outside control or interference, 3) emphasizing the altruistic motivation of most volunteers, 4) encouraging volunteers to accept the authority they have within the emergency situation, 5) encouraging volunteers to see themselves as part of a larger group of medical emergency personnel, and 6) encouraging the community to recognize the professional elements in this volunteer work.

# Legal Issues in Volunteerism: Preliminary Survey Results

Jeffrey Kahn

At AVA's 1984 National Conference on Volunteerism in Asheville, North Carolina, Energize Associates conducted a Legal Issues Survey to sample the experiences of volunteer administrators with legal issues relating to volunteerism. To the best of our knowledge, this is the first time such a survey has been attempted. Three hundred forty-three (343) people have completed the survey to date (either during the conference itself or subsequently by mail), representing a wide variety of volunteer programs nationwide. We were pleased to receive a great many helpful responses.

Because AVA gave permission for the survey to be conducted during the Conference, participants were promised a report in THE JOURNAL on the results of the survey. What follows is a preliminary summary of the written responses we received, as well as an overview of the comments made to us in conversations about the survey with Conference participants. Energize Associates is still compiling and analyzing the full results of the survey, and would like to hear the opinions and experiences of those of you who were unable to attend the Conference. To this end, we are reprinting a copy of the survey questionnaire at the end of this article and encourage any of you who have not already completed the survey to do so now. When we have done our complete analysis of the survey, including the responses we hope to get

from all of the readers of THE JOURNAL, we will be reporting to you again in these pages. Again, we promise to keep all identities anonymous.

While legal questions relating to volunteers have been discussed in print and at conferences, volunteer administrators show a great deal of understandable apprehension when faced with this issue containing so many unknowns. The field of volunteerism often speculates theoretically about the types of legal questions and actions that face volunteer programs; the goal of the Energize Associates survey is to get concrete knowledge about what issues are really important and most on the minds of administrators, and how many of the possible "horror stories" have become realities. Further, this survey is an attempt to ascertain how much influence legal concerns have in volunteer program planning, and to see what kinds of issues have actually been the focus of legal actions.

## ADDITIONAL LEGAL RESEARCH

I have a very special interest in this project. For the past several years I have worked at Energize Associates, doing research and consulting in volunteerism; in addition, I am currently in my second year of law school at the University of Pennsylvania. These legal issues interest me as a future lawyer, with a strong commitment to volunteerism.

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*Jeffrey Kahn is Special Projects Director for Energize Associates, a volunteerism consulting and training firm. He is also a second year law student at the University of Pennsylvania Law School and is on the staff of its Law Review. He is presently researching legal issues relating to volunteers as his contribution to the Review.*

While coordinating the Energize Associates legal survey, I am concurrently conducting an extensive legal search of precedents and relevant court cases involving volunteers. I am also interviewing various law professors and practicing attorneys, especially those specializing in labor law, insurance, and torts. My immediate goal is to submit an article to the University of Pennsylvania Law Review--if it is published (the topic has been formally approved, which is the first step), it will be the first article on the subject of volunteerism to appear in any Law Review in the country.

Unfortunately, most lawyers have never even considered the implications of volunteer-related legal questions and therefore tend to give superficial, inadequate, and sometimes incorrect answers to inquiries from volunteer program leaders. In my opinion, the law should enable and support volunteers, and should operate to expand the impact of volunteer involvement. To non-lawyers, the law can be intimidating and even scary. However, with the proper resources and information, volunteer administrators can intelligently guard against legal problems, while still achieving the maximum potential of volunteer help.

My legal research will be incorporated into the final report on the Energize Associates survey. It is my hope to contribute to the field's understanding of the legal meaning of volunteering--and also to educate some agency and organization lawyers!

## SUMMARY OF ENERGIZE ASSOCIATES LEGAL SURVEY RESULTS

1. To what extent do legal concerns enter into your volunteer program planning?

No Influence	1	2	3	4	5	6	7	8	9	Great Influence
	<u>Response Circled</u>									<u>Frequency</u>
			1							17
			2							27
			3							43
			4							34
			5							47
			6							25
			7							39
			8							51
			9							18
			10							42
										<u>343</u> total responses

2. How adequate do you feel your knowledge of legal issues in volunteerism is?

Inadequate	1	2	3	4	5	6	7	8	9	Sufficient
	<u>Response Circled</u>									<u>Frequency</u>
			1							45
			2							40
			3							54
			4							32
			5							58
			6							29
			7							32
			8							26
			9							11
			10							13
										<u>340</u> total responses

The responses to these two questions indicate a possible problem in volunteer program planning. Most of the respondents felt that legal issues had some substantial influence in their planning, as indicated by the cluster of high frequencies near the top of our scale in the first question. However, the responses to the second question show that many of the administrators feel that they need greater knowledge of these issues. This disparity suggests that there is a need to educate administrators in legal issues, and to ensure that they have adequate legal counsel at their disposal.

Participants' oral reactions to the survey should be considered here and illuminate their written responses.

I would like to share with you some of the reactions I got while administering the survey, and in my many conversations with Conference participants. The large number of people who completed the survey (approximately 50% of those attending the plenary session on that day) indicates the importance ascribed to legalities. Many of the administrators with whom I spoke expressed some confusion about just how legal issues would affect their programs. Not only were there fears about the legal results of actions, but also--significantly--about the impact of even examining such issues. A number of administrators recognized potential legal problems within their organizations, but were afraid to raise them too loudly, for fear that the organization's support of volunteers would waver. This concern of administrators about openly discussing these issues with their top policy-makers leads to questions not only about the force of the legal issues, but also about the nature of the relationship of volunteer programs and organizations. Also, the subject of legal issues seems to produce an ostrich response among volunteer leadership (if we can only hide from the potential danger, it will not materialize).

3. If you had a legal question relating to volunteers, to whom or where would you turn to get an answer?

<u>Response</u>	<u>Frequency</u>
Organization's lawyer	95
Other lawyer (family member, friend, etc.)	31
Lawyer on Board	30
Executive Director/Administrator	30
VOLUNTEER: NCCI	28
State Office on Volunteerism	27
City/County/Municipal Attorney	16
State Attorney/Attorney General	15
Community volunteer lawyer	14
National association (other than VOLUNTEER or AVA)	13
Insurance Agent	11
AVA	9
DOVIA	6
Another volunteer administrator	3
Don't know	1
	<u>335</u> total responses

4. Have you ever consulted with a lawyer or anyone else about a legal question relating to volunteers?

Two hundred and fifteen (215) respondents responded "yes" to this question. They identified the following subjects about which they raised legal questions:

<u>Question Area</u>	<u>Frequency</u>
Liability/Insurance	138
Hiring/Firing Volunteers	11
Volunteer/Salaried Staff Relations	7
By-laws, organization structure, etc.	7
Board member liability	4
Fundraising	4
Taxation	4
Contracts and Agreements	4
Confidentiality	4
Alternative sentencing	3
Miscellaneous/No response	40
	<hr/> 215

That so many administrators have consulted a lawyer or someone else on a legal matter corroborates the finding that legal issues have an important influence in volunteer program planning (question 1, above), and that administrators seek assistance in assessing their legal concerns.

It is no surprise that the most common legal questions concern insurance and liability issues. The questions respondents asked of their lawyers or other individuals relating to liability covered a range of variations. Many administrators were concerned about the liability of their organizations for injuries caused by volunteers, and what insurance coverage is available for this. Liability questions also dealt with liability of volunteers to injured parties, and whether volunteers could get insurance. Finally, some administrators had asked about their own personal liability in the case of an injury caused by a volunteer. While the area of liabilities has received more time in workshops and writing than other legal issues relating to volunteers, clearly it continues to be a source of confusion and concern.

The miscellaneous questions in this area ranged over a number of issues, some of them not directly concerned with volunteers. Among the questions mentioned by respondents were rights of immigrants and unemployed volunteers, volunteers who receive disability payments and fear losing these, and health protection for volunteers working in health care facilities.

5. Has your volunteer program ever been involved in a legal action or lawsuit? This could include any of the following: actual trial; suit settled out of court; formal investigation; licensing authority hearing; administrative proceeding; threatened court action.

Forty-five (45) respondents answered affirmatively to this question. It is understandable that some of them wished to remain anonymous and did not include their names on the survey.

The more extended analysis of this survey will focus on these actual legal actions, and the issues they raised. For this preliminary report, we are listing the subjects of some of the actions:

- EEOC complaint/discrimination (several responses)
- Firing volunteers
- Volunteer tried to get guardianship of a client
- Volunteer misappropriated funds
- Volunteer injured, sued organization (several)
- Client injured by volunteer, sued organization (several)
- Volunteer breached client confidentiality

6. Are you aware of any legal actions involving another volunteer program?

Again, forty-five (45) respondents answered "yes" to this question, and we will be following up on their responses as part of our further analysis of the survey.

7. What legal issues or questions related to volunteers would you most like information about?

Responses fell into the following categories:

<u>Response</u>	<u>Frequency</u>
Liability/Insurance	107
Volunteer/Staff Relations	16
Hiring/firing volunteers	12
Contracts/Agreements	7
Board Member Liability	7
Confidentiality	6

Other issues respondents wanted more information about included problems in evaluating volunteers, taxation, Federal government's use of volunteers, what legal issues to cover in a volunteer orientation session, and "how we can avoid legal actions."

FOR JOURNAL READERS WHO HAVE NOT YET COMPLETED A SURVEY...PLEASE DO SO NOW

ENERGIZE ASSOCIATES LEGAL ISSUES SURVEY

ENERGIZE ASSOCIATES is conducting a survey of volunteer program leaders to gain information about legal issues in volunteerism. To the best of our knowledge, this is the first time such a survey has been attempted. The results of this survey will be made available in several ways, including in THE JOURNAL OF VOLUNTEER ADMINISTRATION. Answers will be used solely for the purpose of this study.

For the purposes of this questionnaire, please define "legal issues" as broadly as possible to include such topics as:

- |                          |                        |
|--------------------------|------------------------|
| law--civil and criminal  | liability              |
| insurance                | statutes               |
| personnel policies       | administrative rulings |
| contracts and agreements | labor relations        |

\* \* \* \* \*

1. To what extent do legal concerns enter into your volunteer program planning? (circle a number)

1	2	3	4	5	6	7	8	9	10
No									Great
influence									influence

2. How adequate do you feel your knowledge of legal issues in volunteerism is?

1	2	3	4	5	6	7	8	9	10
Inadequate									Sufficient

3. If you had a legal question relating to volunteers, to whom or where would you turn to get an answer?

\*4. Have you ever consulted with a lawyer or anyone else about a legal question relating to volunteers?

\_\_\_\_\_ No

\_\_\_\_\_ Yes ..... \_\_\_\_\_ a lawyer

\_\_\_\_\_ someone else: \_\_\_\_\_

What was the question? \_\_\_\_\_

\_\_\_\_\_

\*5. Has your volunteer program ever been involved in a legal action or lawsuit? This could include any of the following: actual trial; suit settled out of court; formal investigation; licensing authority hearing; administrative proceeding; threatened court action.

\_\_\_\_\_ No

\_\_\_\_\_ Yes .....Type of legal action: \_\_\_\_\_

Principle issue: \_\_\_\_\_

\_\_\_\_\_

Result: \_\_\_\_\_

\_\_\_\_\_

6. Are you aware of any legal actions (as listed above) involving another volunteer program?

\_\_\_\_\_ No

\_\_\_\_\_ Yes ..... Describe briefly: \_\_\_\_\_

\_\_\_\_\_

Whom should we contact to get additional information about this?

\_\_\_\_\_

\_\_\_\_\_

7. What legal issues or questions related to volunteers would you most like more information about?

\* \* \* \* \*

\*If you answered yes to either Question 4 or 5, we would like to contact you to conduct a short follow-up interview. We will gladly keep all responses confidential.

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone ( ) \_\_\_\_\_

\* \* \* \* \*

THANK YOU FOR YOUR PARTICIPATION!!! Please return this survey to: ENERGIZE ASSOCIATES, 5450 Wissahickon Avenue, Philadelphia, PA 19144.

# Collaborative Networks: Local Foundations Respond to a Changing Environment

Burton Cohen, PhD and Patricia Patrizi

Non-profit agencies are not alone in having to redefine their purposes, set priorities, and design creative responses to a changing world. Many foundations are going through transformations that are in some ways as dramatic as those of the agencies to whom they provide funding. While foundations are not experiencing the cutbacks and layoffs that have plagued many non-profits, they are finding themselves facing new challenges and pressures and are seeking new ways to respond.

What are some of the forces or trends that are affecting foundations? First, foundations are becoming more "public" in the sense that people know more about their existence, what they are funding, and how to tap their resources. This has come about through federal legislation mandating more stringent reporting requirements, through closer scrutiny by the public, and through a heightened sense of accountability.

Second, foundations have had to become more focused in determining priorities and funding criteria. This comes as a result of simply receiving more requests as well as a much greater diversity in the types of requests and their sources. Rather than requests coming only from agencies, there are now multiple entry points as when the Philadelphia Commerce Department asked city foundations for input before issuing an RFP (Request for Proposal). All

foundations have not been affected equally. Here in Philadelphia, the Pew Memorial Trust has reported a significant increase in funding requests since 1979 when the first Annual Report was published. The William Penn Foundation, on the other hand, has maintained a relatively stable level of requests.

A third, and related trend, is the tendency for foundations to look for ways to take more initiative, or be more proactive in shaping a project. This comes partly from a desire for more creative responses to some of the pressing problems of the community. It may also be a response to feeling overwhelmed and searching for some way to establish a direction.

## HOW HAVE FOUNDATIONS RESPONDED?

There are three major ways that foundations can respond to an increase in community needs, multiple demands on staff, and a need for more innovative and systemic solutions. The first is by working to improve their own internal planning and management capabilities. The William Penn Foundation now prepares an annual plan for new initiatives, in addition to its normal planning and priority setting processes. The staff of the Glenmede Trust recently held a one-day retreat to discuss ways of improving internal planning and decision-making. Activities

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like these will undoubtedly continue and increase. At the same time, ways will have to be found to enable smaller foundations to improve their internal decision making also.

A second possible response is to form a cooperative foundation association. These have been formed in at least ten large cities and their activities range from formal grant-making associations that pool funds, to information sharing and research, to informal meetings around common interests. In Philadelphia, the idea of a formal association has been strongly resisted. Foundations prefer to maintain control of their own funds and to be able to identify the recipients of their grants. There is also the feeling that creating an intermediary organization could be wasteful and inefficient.

Instead, Philadelphia area foundations have developed a third response: the development of "collaborative networks." These are self-organizing groups of staff members from different foundations organized loosely around specific projects or around a common area of concern. Examples of the former would be joint efforts in the areas of summer employment for youth, monitoring the City's response to the problems of the homeless, and juvenile justice. An example of the second type would be the Women in Philanthropy network that has been meeting for the past year to discuss issues related to women and girls, and to provide peer support. These collaborative networks have little formal structure, overlapping memberships, and are usually temporary, existing only as long as the projects exist or the members feel there is a need. They represent an adaptive and flexible response to many of the problems that foundations currently face. Two examples are described below.

#### SUMMER JOBS COLLABORATIVE

A variety of different but related forces brought together the Philadelphia Summer Job Collaborative. In

1981, CETA funds were cut, youth unemployment approached new heights and a number of foundations responded through grants to the City programs. It was known, however, that many of the foundations were dissatisfied with the results of their investment. At the same time, the William Penn Foundation had resurrected a model program developed in the '70s.

In the winter of 1982, C. Richard Cox of the William Penn Foundation invited seven local foundations to breakfast to discuss the issues and the potential for a joint foundation venture for the following summer. This group soon expanded to fifteen members representing philanthropic and corporate foundations; both large and small in size and resources. Committees were generated, requests for proposals and uniform reporting plans were developed, and eventually eleven sites were selected for grants.

Reflecting upon the organizing effort, Cox reported a fairly quick acceptance of the goals and objectives of the William Penn program, as well as William Penn's leadership in the effort. The principal issue of concern was the reluctance of the foundations to pool their dollars. This concern was creatively addressed. A bidding process was devised, allowing each foundation to specify which of the grantees would receive their funds. This enabled each foundation to maintain control over the allocation process, and it allowed money from different sources to be pooled once given to the program.

The project was a resounding success programmatically and inter-organizationally. Jobs were provided to 1500 teenagers. Beyond that, 47% of the students were employed extra hours and approximately 25% were employed after the six-week period covered by the foundation grants.

The foundation group was able to achieve results that no single foundation had yet attained. The collabora-

tive provided the members with several things:

- a means to develop a large scale program with sufficient resources to assure programmatic soundness;
- staffing assistance to foundations without staff (only 6 in Philadelphia have any full-time staff);
- the development of a network of funders that expanded the existing foundation network; one corporate donor wrote to every major corporate donor in the city;
- an opportunity to share with colleagues new ideas, problems and skills.

The success of this project is most evident in its plans for the future; in 1984, 22 foundations will participate, with all of the original members continuing. The total grant amount has increased over 33% to a sum in excess of one million dollars.

#### HOMELESS STUDY COLLABORATIVE

A second example illustrates a different role from collaboration in funding a direct service and involves monitoring the City's response to the shelter needs of the homeless. As the problem of the homeless became more apparent in Philadelphia, several foundations began to wonder what they could do to be of assistance. A group of foundation staff members began meeting to discuss the problem, with the leadership coming from Kay Pyle of the Philadelphia Foundation, and Mary Kuhn, then on the staff of the Glenmede Trust. Meetings were arranged with the Managing Director, the Health Department, and other agencies as the group explored various ways of responding. Some wanted the foundations to provide funds for direct services, others favored an advocacy approach and still others wanted to provide capital funding. Through a

slow process, the group developed a joint project to monitor the shelter programs being provided by the City and assist in the ongoing planning process. City officials were highly supportive of the initiative and participated in the process of selecting someone to conduct the study.

After reviewing three proposals, the collaborative awarded a two-year grant to the Philadelphia Health Management Corporation and the group continues to meet to review the project. Eight different foundations were originally involved in the funding and two others have participated in the meetings. Philadelphia Foundation provides ongoing leadership for the collaborative effort which is now entering its second year.

#### WHAT HAS BEEN LEARNED?

There has always been some interaction between members of the foundation community in Philadelphia, probably more than most people are aware. For the most part, it has been built around personal relationships and a desire for peer support. But the people we interviewed noted that there has been a marked increase in collaboration in the past two to three years, and it has been more organized and focused than in the past. According to Dick Cox, such networks are most likely to appear in situations that require a large sum of money in order to have any impact (as with the summer jobs for youth), in situations that catch the imagination and invite creative responses, and in situations where everyone is interested in learning about something. The "homeless" project falls into this latter category. Many of the foundations that joined this network could have funded the project on their own, but each was interested in deriving some learning from the effort.

While the formation of collaborative networks may appear to be haphazard, or unsystematic, the ap-

proach has the advantage of ensuring that there will be a real commitment to the efforts selected. Collaboration is not undertaken just for its own sake, but where there is a genuine and deeply felt purpose. Also, because there is no formal intermediary to initiate the various efforts or provide leadership, the local partners are forced to adopt a shared leadership approach in which different foundations take on the lead role in different collaborative networks.

The shared leadership feature also tends to limit the potential number of networks that can exist at any one time because there are only a handful of possible lead foundations, i.e., those that have a paid staff. This is probably just as well, since foundations have learned that managing and participating in collaborative networks can be time consuming. Aside from the logistics involved, the participants have to learn new ways of behaving in settings where resources and authority are shared. Just as non-profits have learned that joint ventures with each other can be complicated and challenging to implement, foundations experience some of the same conditions when they seek to collaborate on a more organized basis.

#### WHAT LIES AHEAD?

While to many it may appear that foundations are going about "business as usual," our sense is that some major shifts have begun that are irreversible. As a result of changes in the wider environment, the following things are happening to foundations:

They are experiencing new and multiple demands—from the public, from government and business, as well as from those who traditionally have sought funds.

They are more open to new ideas, including those from other foundations, and to new approaches.

They are becoming more reflective and taking what they do more seriously.

We believe that collaborative networks will play an increasing role in how foundations respond to community needs, but that they will be very selective about where and when to use this response. Networks provide a mechanism for a more systemic, rather than piece-meal approach to community problems. But if they are to be effective and have the desired impacts, their implementation will likely mirror the same complexities exhibited by the problem setting itself. For example in the case of the "homeless" collaborative, the desire for real City involvement and for the study to influence the ongoing design of programs for the homeless, results in having to manage a much more complex and less predictable set of relationships.

Besides collaboration among themselves, foundations face an increasing challenge of finding effective ways to collaborate with local government and with the business community around economic development and social issues. As such efforts as the homeless study and the summer jobs project continue, foundations may experience increasing tensions between the more detached role of funding a specific direct service without the responsibility for widespread dissemination or feedback, and increasing involvement in complex public policy issues. They often feel caught in the middle. As Madeline Baron of the Glenmede Trust has noted, to take too strong a role may seem inappropriate, and yet taking too little may result in nothing getting done. How effectively they can manage this tension is perhaps the greatest challenge that foundations face in the years ahead.

# Research in Volunteerism Update

Darlene Palmer and Barbara Nell Stone

In an attempt to update "Research in Volunteerism"<sup>1</sup> that appeared in the Fall 1983 issue of THE JOURNAL, it becomes apparent that most of the recent graduate research in volunteerism falls into topic areas previously discussed in the earlier article. In an attempt to streamline and combine topic groupings a few headings have changed names. Volunteer Roles/Paid Staff and Characteristics of Volunteers are now titled Volunteers/Volunteering. The topics Advisory Councils and Boards and Power are now subsumed under the title Organizations/Organizational Interactions. Finally, a new topic heading, Funding, has been introduced in this article.

Current thesis and dissertation research in volunteerism seems to show no new trends in topic areas with the exception of research related to funding and volunteer programs. This may reflect some influence by the Reagan Administration on the need for support for volunteerism by the private sector. Given the Administration's position on the role of private enterprise and volunteerism, it would seem that much more research needs to be done on government funding and funding in general for volunteer programs.

Further study might also be done on the use of microcomputers and volunteerism. Studies could pursue how volunteer programs could better maximize their potential with microcomputer use. The cost-effec-

tiveness of microcomputer use could be examined. Certainly this is an area ripe for research.

Another area for future research could include the feasibility of health insurance for volunteers. The rising cost of health care today makes this a particularly salient topic. One might study the cost effectiveness of such insurance in the light of its obvious incentive for potential volunteers. Again, this is an area for further research.

As in the earlier article, the compilation of these titles of research has been taken from Dissertation Abstracts (annual research listings done by graduate students in the United States and other countries). Certainly a more thorough study of the abstracts needs to be done to better understand the research in which the reader might be interested.

## SUMMARY OF GRADUATE RESEARCH

The following list of volunteer-related research conducted by individuals working toward masters or doctoral degrees may not be complete. If you know of additional studies please send this information to THE JOURNAL in care of Graduate Research."

Additionally, it is helpful to be aware that such reports are written in a very formal, stylized manner. The report almost always adheres to the following outline:

---

*Darlene Palmer is a doctoral student in Interdisciplinary Education at Texas A&M University. She has volunteered in marital counseling, parenting and religious education programs. Barbara Nell Stone is Associate Professor of Interdisciplinary Education at Texas A&M University. She has been both volunteer and paid staff in several agencies.*

Chapter 1 - Introduction to the research problem

Chapter 2 - Review of information from journals and books which relate to the problem

Chapter 3 - Description of the research methodology

Chapter 4 - Analysis of the information that has been gathered

Chapter 5 - Conclusions and implications for the field and for further research

Chapters 4 and 5 would probably prove most useful to the practitioner. Study the information in light of your experience. You might want to go back to Chapter 2 to find out what other studies are taking place in this area. Perhaps your own experience might bring to light further areas in need of study. Again, we encourage you to pass your interests and concerns along to THE JOURNAL editor.

#### Cross Cultural

Udom, U.E. "The Politics of National Service Programs: A Comparative Study of the National Youth Service Corps in Nigeria and Volunteers in Service to America in the United States." University of Texas at Austin. Ph.D. 81-28701. 337p., 1981.

#### 4-H

Noland, R.W. "An Assessment of Middle Management Volunteers in Oregon's 4-H Programs." Oregon State University. Ph.D. 82-26262. 124p., 1983.

Rohs, F.R. "Social Background Personality and Attitudinal Factors Influencing the Decision to Volunteer and the Level of Involvement among Adult 4-H Leaders." The Ohio State University. Ph.D. 83-05385. 169p., 1982.

Salmon, C.R., Jr. "Factors Influencing 4-H. Adult Volunteer's Adoption of New Skills and Knowledge Presented at the Texas 4-H

Center from January 1, 1980 to December 31, 1981." Texas A&M University. Ed.D. 83-06845. 147p., 1982.

#### Funding

Bertuccio, R.T. "The Effects of Government Funding on a Private and Voluntary Organization's Development Assistance Programs." The American University. Ph.D. 82-04556. 187p., 1981.

Gibelman, M.N. "Public Purchase of Voluntary Agency Services Assessing the Impact on Social Service Delivery." Adelphi University. D.S.W. 81-21266. 303p., 1981.

Sybouts-Peccolo, D.L. "An Economic Analysis of Alternative Means of Family Support for Volunteer Activities." The University of Tennessee. Ph.D. 83-16394. 116p., 1983.

#### Organizations/Organizational Interactions

Arlinghaus, B.E. "The West Fork Jaycees: Social Exchange and Social Mobility in a Rural Voluntary Association." Indiana University. Ph.D. 83-00839. 415p., 1982.

Bycer, A.M. "The Voluntary Association in Transition: A Case Study of the YWCA of Metropolitan Chicago." The University of Chicago. Ph.D., 1981.

Crittenden, W.F. "An Investigation of Strategic Planning in Voluntary Non-profit Organizations." University of Arkansas. Ph.D. 83-05156. 222p., 1982.

Evans, D.A. "Linkage Functions of Voluntary Neighborhood Associations in Improving Neighborhoods." Washington University. Ph.D. 81-26118. 199p., 1981.

Kirkpatrick, T.G. "Small Group Discussion Leadership in Volunteer Organization: An Exploratory Investigation." University of Washington. Ph.D. 1981.

Knapen, J.M.P. "Participation in Voluntary Organizations and Status Inconsistency." The University of British Columbia (Canada). Ph.D., 1982.

Mitchell McKee, L.G. "Voluntary Youth Organizations in Toronto 1880-1930." York University (Canada). Ph.D., 1983.

Muhamad, J.N.B. "Rural Community Influentials: Participation in Local Voluntary Organizations." The Louisiana State University and Agricultural and Mechanical College. Ph.D. 83-12099. 184p., 1982.

Richard, W.D. "Whither the Natives: A Grounded Theory Approach to Communication and Conflict in Voluntary Organizations." The University of Iowa. Ph.D. 83-27419. 220p., 1983.

#### Programs

Adams, R.S. "The Characteristics of Verbal Interpersonal Communication between Community Volunteers and Prisoners." University of Oregon. Ph.D. 83-01755. 228p., 1982.

Andrews, T.J.C. "A Study of the Use of Volunteers in Child Abuse and Neglect Prevention Programs." The Florida State University. Ed.D. 83-06152. 152p., 1982.

Chung, D.K. "A Pilot Study of a Volunteer Intervention Model in Helping Chronically Mentally-disabled Patients Adjust to Community Placement." The Ohio State University. Ph.D. 82-07163. 205p., 1981.

Corney, J. "A Study of Successful Elementary School Volunteer Parent Participation Programs." University of Southern California. Ed.D., 1983.

Dawson, E.B. "An Attitudinal Inquiry of Principals, Department Chairpersons and Teaching toward Senior Citizen Volunteer Pro-

grams in Philadelphia, Pennsylvania Vocational Technical Schools and Skills Centers." Temple University. Ed.D. 81-11289. 172p., 1980.

Hill, C.P. "A Comparative Study of Formal Volunteer Programs in Educational Settings." The University of Utah. Ed.D. 81-11289. 1980.

Holzmilller, R.J. "Using Volunteer Aides in a K-5 Elementary School." The University of Arizona. Ph.D. 83-05985. 201p., 1982.

Kornblum, S.F. "Impact of a Volunteer Service Role upon Aged People." Bryn Mawr College, The Graduate School of Social Work and Social Research. Ph.D. 82-07595. 209p., 1981.

Mosley, E.S.C. "The Effects of a Classroom Volunteer Program on Achievement, Self Concept, and Behavior among Primary Grade Pupils." Oklahoma State University. Ed.D. 83-04875. 171p., 1982.

Patrick, W.K. "Volunteerism in Health Care: A Model for Community Participation." The University of Michigan. Ph.D. 83-04569. 309p., 1982.

Rowe, H.E. "An Evaluation of a Volunteer Night Chaplaincy in a Local Community Hospital." Eastern Baptist Theological Seminary. D. Min. 82-19458. 193p., 1982.

Souris, C.N. "The Rehabilitative Effectiveness of a Community Reintegration Program: The Utilization of Incarcerated Offender Volunteer Workers in a Human Service Setting." Boston College. Ph.D. 82-04016. 178p., 1981.

Titus, E.G. "A Comparative Study of the Learning Outcomes of Senior Citizens in Assertiveness Training Provided by Professional Trainers and Trained Peer Volunteers."

University of Wyoming. Ph.D. 82-29056. 125p., 1982.

### Recruitment/Retention

Bassett, P.A. "An Analysis of Leaders' Perceived Role Design as It Relates to Role Satisfaction in Voluntary Organizations." The University of Iowa. Ph.D. 82-22216. 225p., 1982.

Bishaw, M.L. "Communication Attachment: A Path Model Analysis of Participation Events Which Influence Organizational Commitment and Burnout in Human Services Staff and Volunteers." University of Oregon. Ph.D. 247p., 1982.

Brown, B.E. "The Identification of Major Competencies and Attributes Needed by Volunteer Literacy Tutors of Adults and the Development of a Tutor Self-assessment Inventory." Northern Illinois University. Ed.D. 82-09209. 141p., 1981.

Cecil, J.W. "A Critical Analysis of the Foreign Mission Board's Procedures for the Involvement of Short Term Volunteers in Personal Presence Overseas Ministries." Southwestern Baptist Theological Seminary. Ed.D., 1981.

Cleveland, L.C. "The Use of Community Volunteers in a Rural Secondary School Gifted and Talented Program." The Florida State University. Ed.D. 81-08183. 183p., 1980.

Hartley, N.L. "Measurement of Performance Potential of Volunteer Telephone Crisis Line Workers." Washington State University. Ph.D. 83-25467. 86p., 1983.

Landus, D.H. "The Comparative Effects of a Career Decision Making Program on Volunteering and Nonvolunteering Secondary Students." Wayne State University. Ph.D. 83-15605. 222p., 1983.

LaPiana, K.A. "A Study to Determine the Competencies Necessary for a Volunteer Teacher of English as a Second Language." Oregon State University. Ph.D. 82-27581. 172p., 1983.

Leopold, C.M. "A Determination of the Significance of Selected Relationships Existing between Parent Membership on Mandatory School Advisory Councils and Voluntary Participation in Other School Activities in South Carolina." University of South Carolina. Ed.D. 82-12250. 77p., 1981.

Tierce, J.W. "The Role of the Secondary School Volunteer as Perceived by School Volunteer Coordinators." Texas A&M University. Ph.D. 82-19147. 248p., 1982.

### Training

Badeaux, L.M. "An Evaluation of a General Semantic Approach in Teaching Situational Leadership Theory in Women's Volunteer Service Organizations." The Louisiana State University Agricultural and Mechanical College. Ph.D. 82-07805. 124p., 1981.

Goldman, M.S. "Effects of a Training Program for Volunteers on Their Knowledge and Special Education Student Achievement." Columbia University Teachers College. Ed.D. 83-04016. 183p., 1982.

Lynch, T. "Rationale and Text for a Correspondence Course in Volunteer and Staff Development for Community Theatre." University of Kansas. Ph.D. 81-28785. 391p., 1981.

MacGorman, B.R.S. "A Study of the Effectiveness of a Training Program for Volunteers in a Special Education Program for Orthopedically Handicapped and Multi-handicapped Students." North Texas State University. Ed.D. 81-18091. 256p., 1981.

Walter, J.A. "An Analysis of the Factors Affecting Participation in a Volunteer Staff Development Program." University of Cincinnati. Ed.D. 83-28334. 127p., 1983.

#### Volunteers/Volunteering

Brooks, A.E. "Profile of the Church-related Volunteer." Texas Tech University. Ed.D. 82-102450. 197p., 1980.

Chapman, T.H. "University Students' Reasons for Volunteering." University of Missouri-Columbia. Ph.D. 81-08785. 91p., 1980.

Endus, L.E. "Volunteer Service and Political Participation of Professional Home Economists." Iowa State University. Ph.D. 82-21183. 127p., 1982.

Huettig, C.I. "Motives of Special Olympics Volunteers." Texas Women's University. Ph.D. 83-12279. 166p., 1982.

Lichtenstein, M. "Some Correlates of the Amount of Volunteer Activity in a Sample of Elite Women: The Relating Effect of Previous Volunteer Experiences and Socio-personal Characteristics." Rutgers University. The State University of New Jersey (New Brunswick). Ph.D. 83-20492. 212p., 1983.

Paget, V.M. "Commitment of Volunteers and the Work of the Church." Washington University. Ph.D. 83-02353. 273p., 1982.

Perry, W.H. "A Study of Older Volunteers in Leon County, Florida." The Florida State University. Ph.D. 82-14937. 171p., 1982.

Polgar, A. "A Structural Development Analysis of Levels of Social Reasoning in Correctional Volunteers." University of Toronto (Canada). Ph.D., 1982.

Reichlin, S.D. "From Civic Duty to Psychological Reward: The Changing Rationale for Volunteering in America." University of Pittsburgh. Ph.D. 82-13105. 207p., 1981.

Vienneau, J. "A Study of Leadership Behavior of Volunteer Administrators in Amateur Sports Organizations in the Province of New Brunswick, Canada." The Florida State University. Ph.D. 82-29162. 115p., 1982.

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#### FOOTNOTES

<sup>1</sup>Barbara Nell Stone, "Research in Volunteerism," The Journal of Volunteer Administration, II, 1 (Fall 1983), pp. 19-24.

# Letters

Dear Editor:

I'd like to ask your assistance in helping us obtain information on market research that may have been recently conducted by volunteer organizations. As you know the volunteer community has changed considerably in recent years. We anticipate that these changes will continue. However, in order to effectively plan we are in need of more hard data. We are interested in knowing if other organizations have conducted in-depth volunteer market research over a specified period of time. Are you aware of any research that has been conducted that has asked such questions as:

*Are you volunteering more or less than two years ago? Have the number of hours per week you are able to volunteer decreased in the past two years? the past year? Etc.*

It would be most helpful if you would include this request for information on market research in your next issue of The Journal of Volunteer Administration.

Sincerely,

Maggi Davern  
Executive Director  
Voluntary Action Center of the St.  
Paul Area  
518 Bremer Building  
419 North Robert Street  
St. Paul, Minnesota 55101  
612-227-3938

# Abstracts

## "Sweden: Involuntary Volunteers? "

Denis P. Doyle

Wall Street Journal, April 17, 1984

To cope with projected increasing costs of care for the aged, handicapped, young or ill the Swedish Secretariat for Future Studies has proposed, in lieu of additional taxes, that the government "levy time." Everyone aged 19 to 65 would be required to give four to six hours per week to community service. The program would begin with 11 year olds who would be assigned various tasks such as "cleaning up, performing errands and helping people who have difficulty in coping by themselves."

This proposal emanates from this prestigious study group as a more acceptable alternative than raising taxes, reducing the quality or quantity of care, reducing the wages of care providers, or returning women to the home to provide the needed care.

Because Sweden does not have voluntary, non-profit agencies in the tradition of the United States, the proposal would have the effect of creating an independent sector to fill the void that now exists.

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## "From Retirement to Re-engagement--Young Elders Forge New Futures "

Mary K. Kouri

The Futurist, June, 1984

The message conveyed by the author is capsulized in the title. Today's "young elders" are the 55-75 year olds who are refusing to go quietly into retirement villages or senior citizen centers. A profile of the new elderly is presented which suggests the following:

1. a higher level of education than previously achieved by this age group;
2. a significant number are "knowledge workers" who have been engaged in technical, professional and administrative capacities;
3. the young elders are healthier and have a longer life expectancy; and
4. retirement is planned and financially feasible for many.

Unfortunately, retirement is found to be a problem. This population will not be shunted aside and wishes to become re-engaged in activity. How? Three

models are presented, including, phased retirement, mentoring, and community service. Finally, "the Life Design Process," a program of SAGE (Seniors Actualization and Growth Explorations), is described.

Abstractor: Dr. Tessie B. Okin, Senior Professor, School of Social Administration, Temple University, Philadelphia, PA.

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*THE JOURNAL extends a sincere thank you to Gordon Manser who is stepping down as Abstracts Editor. For the past two years he has worked hard toward building this potentially valuable JOURNAL section. We also welcome Katherine Noyes to the Abstracts Editor position. Anyone wishing to assist in locating articles and writing abstracts is encouraged to contact Katherine at the following address:*

*Katherine H. Noyes  
Virginia Division of Volunteerism  
825 East Broad Street  
Richmond, VA 23219  
(804) 786-1431*

# THE JOURNAL OF VOLUNTEER ADMINISTRATION

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## GUIDELINES FOR SUBMITTING MANUSCRIPTS

THE JOURNAL OF VOLUNTEER ADMINISTRATION encourages the submission of manuscripts dealing with all aspects of volunteerism. We will gladly work with authors to assist in the development of themes or appropriate style. The following are key guidelines:

### I. CONTENT

A. THE JOURNAL OF VOLUNTEER ADMINISTRATION provides a forum for the exchange of ideas and the sharing of knowledge about volunteer administration. Articles may address practical concerns in the management of volunteer programs, philosophical issues in volunteerism, and significant applicable research.

B. Articles may focus on volunteering in any type of setting. In fact, THE JOURNAL encourages articles dealing with areas less visible than the more traditional health, social services, and education settings (though, of course, these are welcome as well). Also, manuscripts may cover both formal volunteering and informal volunteering (self-help, community organizations, etc.). Models of volunteer programming may come from the voluntary sector, government-related agencies, or the business world.

C. Please note that THE JOURNAL deals with volunteerism, not voluntarism. This is an important distinction. For clarification, here are some working definitions:

1. volunteerism: anything related to volunteers or volunteer programs, regardless of setting, funding source, etc. (so, for example, this includes all government-related volunteers).
2. voluntarism: refers to anything voluntary in our society, including religion; basically refers to voluntary agencies (those with volunteer boards and private funding)—but voluntary agencies do not always utilize volunteers.

Our readership and focus is concerned with anything regarding volunteers. A general article about, for example, changes in Federal funding patterns may be of value to executives of voluntary agencies, but not to administrators of volunteer programs necessarily. If this distinction is still unclear, feel free to inquire further and we will attempt to categorize your manuscript subject for you.

D. THE JOURNAL is seeking articles with a "timeless" quality. Press releases or articles simply describing a new program are not sufficient. We want to go beyond "show and tell" to deal with substantive questions such as: why was the program initiated in the first place? what obstacles had to be overcome? what advice would the author give to others attempting a similar program? what variables might affect the success of such a project elsewhere? what might the author do differently if given a second chance? what conclusions can be drawn from the experiences given?

Articles must be conscious demonstrations of an issue or principle.

### II. PROCEDURE

A. The author must send three (3) copies of the manuscript to THE JOURNAL office.

- B. With the three copies, authors must also send the following:
1. a one-paragraph biography, highlighting the author(s)'s background in volunteerism;
  2. a cover letter authorizing THE JOURNAL OF VOLUNTEER ADMINISTRATION to publish the submitted article, if found acceptable;
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C. Manuscripts may be submitted at any time during the year, but the following are the deadlines for consideration for each issue:

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D. Articles will be reviewed by a panel of Reviewing Editors. The author's name will be removed to assure full impartiality. The review process takes six weeks to three months.

1. Authors will be notified in advance of publication of acceptance of their articles. THE JOURNAL retains the right to edit all manuscripts for basic writing and consistency control. Any need for extensive editing will be discussed with the author in advance. Published manuscripts will not be returned.

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3. If a manuscript is returned with suggestions for revisions and the author subsequently rewrites the article, the second submission will be re-entered into the regular review process as a new article.

E. Authors of published articles will receive two complimentary copies of the issue of THE JOURNAL carrying their article.

F. Copyright for all published articles is retained by the Association for Volunteer Administration.

### III. STYLE

A. Manuscripts should be ten to thirty pages in length, with some exceptions.

B. Manuscripts should be typed, double-spaced on 8½" x 11" paper.

C. Manuscripts should be submitted with a title page containing title and author and which can be removed for the "blind" review process. No name should appear on any text page, though the article title may be repeated (or a key word used) at the top of each page.

D. Footnotes should appear at the end of the manuscript, followed by references listed alphabetically. If references are given, please use proper style and doublecheck for accuracy of citations.

E. Authors are advised to use non-sexist language. Pluralize or use he/she.

F. Contractions should not be used unless in a quotation.

G. First person articles are acceptable, especially if the content of the article draws heavily upon the experiences of the author. This is a matter of personal choice for each author, but the style should be consistent throughout the article regardless of form used.

H. Authors are asked to use interior headings to aid the reader in keeping up with a lengthy article. Refer to sample sub-titles in this issue to see how various texts have been broken up at intervals.

I. Illustrations (photographs, artwork) will only be used in rare instances in which the illustrations are integral to the content of the article.

J. Figures and charts should be submitted only when absolutely necessary to the text of the manuscript. Because of the difficulty we have in typesetting figures and charts, authors are requested to submit such items in camera-ready form. Figures and charts will generally be placed at the end of an article.

Please feel free to submit outlines or first drafts to receive initial response from us. If your work is not accepted on the first try, we are open to resubmissions.

Further questions may be directed either to our administrative offices in Boulder or to Susan Ellis, Editor-in-Chief at 215-438-8342.

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