

Training Retirement Age Volunteers

by

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ABSTRACT

Many organizations find that they cannot keep their retirement age volunteers over an extended period of time. Often, this is due to a lack of proper orientation and training. The design used to orient and train this group must meet their special learning needs. This study will focus on the volunteer coordinator positions of medical facilities located in Western Wisconsin. By conducting face-to-face interviews, as the primary data collection technique, the researcher looks to understand how and if they are designing their orientation and training for the unique needs of this group of volunteers. By using a descriptive summary from each of the interview questions, any conclusions drawn can be utilized to make recommendations for improvements or for the implementation of orientation and training for those volunteers of retirement age.

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I am blessed to be the daughter of an octogenarian father who is the embodiment of lifelong learning. His incredible curiosity about the world around him keeps him young, and vital. He sets such a good example for his children. One of his many gifts to me has been the value of continued learning and I am forever thankful for that.

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TABLE OF CONTENTS

	Page
.....	
ABSTRACT.....	ii
Chapter I: Introduction.....	1
<i>Statement of the Problem</i>	2
<i>Purpose of the Study</i>	2
<i>Assumptions of the Study</i>	3
<i>Definition of Terms</i>	4
<i>Methodology</i>	5
Chapter II: Literature Review.....	6
Chapter III: Methodology.....	16
<i>Subject Selection and Description</i>	16
<i>Instrumentation</i>	17
<i>Data Collection Procedures</i>	17
<i>Data Analysis</i>	18
<i>Limitations</i>	19
Chapter IV: Results.....	20
<i>Item Analysis</i>	20
Chapter V: Discussion.....	30
<i>Limitations</i>	30
<i>Conclusions</i>	31
<i>Recommendations</i>	34
References.....	36
Appendix A: Consent Form.....	39

Appendix B: Interview Questions..... 42

Chapter I: Introduction

Most retirement age people express the need and want to remain active. With retirements starting to stretch into two or three decades, many retiree's are assuming volunteering will become a natural and very fulfilling part of their post-work lives (Greene, 2006). The adults in this age group want to learn, develop their abilities and make a contribution to society. To achieve this goal, some of them have an interest in volunteering their services to charitable organizations, civic groups, political or policy causes and the like. Many in this group have had successes in their work lives and are seeking similar success in their volunteer work. To help them accomplish this, this research is attempting to assess the need for an orientation and training program to prepare them for their work, maintain their enthusiasm for that work and to make their efforts productive to the organization and the people that they serve.

In many volunteer situations, supervisors and leaders are not sufficiently demanding of their volunteers. Many times these supervisors and leaders may feel constrained by the lack of an economic "hold" over their unpaid workers and may even feel guilty about pushing too hard or administering even the slightest amount of discipline (Butler and Gleason, 1985). A volunteer program must be designed to provide powerful incentives for personalized employment satisfaction. To prevent volunteerism from implying amateurism, a comprehensive orientation and training package might be a necessity for these individuals to be motivated and regarded as professionals in their work.

While a significant number of these retirement age volunteers have become accustomed to occasional training over the course of their working years in order to stay

abreast of changing technologies and work methods in their area of specialty, it would seem rational to expect that they would also want the same opportunity in volunteer work. Maintaining pride in one's work is much easier, whether in a paid or volunteer role, when working with effective and efficient tools. Since many of the researcher's family, friends and close acquaintances have had both positive and negative experiences volunteering and the researcher is a member of retirement age group and has a strong wish to volunteer, it is important to know how organizations are preparing to orient and train volunteers.

Statement of the Problem

This study seeks to determine the extent to which organizations, in Western Wisconsin, are providing orientation and training to retirement age volunteers that meets their learning needs.

Purpose of the Study

The researcher feels that the Western Wisconsin area has a significant number of organizations and groups that use the services of retirement age volunteers and that many more organizations within this area have the potential to use these volunteers. This area also has a significant number of retired citizen residents who may be willing to accept volunteer offerings. Add to this the realization that in the next few years there will be an influx of the "Baby Boomer" generation that can add significant numbers to volunteer organizations.

The study results should describe current practices of organizations in their orientation and training program for retirement age volunteers, how they are meeting the learning needs of this group and identifying the strengths and weaknesses of those

programs. The results of the study can then be shared with various organizations or groups to implement and/or improve their orientation and training and also provide another researcher with the opportunity to design the orientation and training necessary for successful volunteer programs utilizing retirement age citizens.

Research Objectives

The researcher has no knowledge of a study of this nature ever having been previously executed. The research objectives of this study are to determine:

1. The extent to which organizations are trying to match the skills/experiences of retirement age volunteers to available positions.
2. How the organizations have designed an orientation and training program to specifically meet the learning needs of retirement age volunteers.
3. The method in place to help reinforce the training.
4. How feedback is provided and in what form.
5. The existence of an incentive or reward program and if it provides adequate motivation (from the organization's perspective) to the volunteer.

Assumptions of the Study

The assumptions of the study are listed below:

1. Volunteer coordinators will be available for interviews.
2. All volunteer coordinators interviewed will have sufficient knowledge and background to provide accurate information concerning the orientation and training of retirement age volunteers.
3. All interviewees will be truthful and honest in their responses.

4. The results, conclusions and recommendations acquired in this study will be used to benefit the organizations that utilize retirement age volunteers and create or improve their orientation and training methods.

Definition of Terms

Retirement Age: The age that most people could, if they have been in the workforce, retire from that work.

Volunteer: Providing services, without pay, attached to and organized through organizations.

Volunteer Work: Work without pay on the part of an individual with the intent of benefiting others (Willingen, 2000).

Volunteer Coordinator: A position whose duties include recruitment, screening, selection, orientation, training, scheduling, evaluating and planning for the continued motivation (rewards) of volunteers.

Limitations of the Study

The limitations of this study are:

1. The data is limited to interviews conducted with volunteer coordinators in an approximate one hour time period.
2. The data is limited to interviews, and therefore, only one data collection technique.
3. The data is limited to the perspective of only five volunteer coordinators.
4. The data is limited to the five medical facilities of the five volunteer coordinators.

Methodology

Chapter Two will provide documentation on the significance of meaningful activity and the need to contribute for this retirement age volunteer group. The researcher will then present research on the mental fitness of older adults, followed by information on how this age group learns best and the importance of design in orientation and training.

The remaining chapters will include the following: discussion of the methods and procedures used for this study; the results of the research; the summary and conclusions drawn from the research, as well as, recommendations related to the study and to future research in this area.

Chapter II: Literature Review

The purpose of this study is to identify what level of orientation and training is being provided to retirement age volunteers in Western Wisconsin and if it is meeting the learning needs of this group. Since this group of volunteers has special learning needs, it is important to assess whether the orientation and training provided is meeting those needs and allowing them to be successful in their efforts. We also need to know how and if the orientation and training program is evaluated.

While many of us may think that the organizations that could use retirement age volunteers are using them and that they have a position available to do that training, we are wrong. According to a 2004 survey conducted by The National Council on the Aging's RespectAbility program, about half of the 21 organizations surveyed said they had no systems in place to screen and assess older volunteers, much less place them in positions (Parkin, 2005). This was due to both the lack of trained volunteer coordinator positions and the needs to orient and train the volunteers. The ranks of older volunteers are increasing and we appear to be largely unequipped to use this group as volunteers.

America is expecting 77 million baby boomers as potential volunteers. In 2006, the baby boomers start to turn 60 years old. The significance of this is that this entire generation (1946-1964) has reached the ages of 42 and 60, which are considered prime ages for volunteering (Fritz, 2006).

In this chapter the researcher will discuss the importance to this age group of meaningful activity and their need to contribute as it relates to volunteerism. Research will also be presented on mental fitness in older age, how best this group can learn and the importance of the design of an orientation and training program.

Importance of Meaningful Activity

Of the many theories on psychosocial aging, the Activity Theory seems to apply best to the subject of this research. This theory emphasizes the importance of on-going social activity (Lemon, Bengtson, and Peterson, 1972). It also makes the assumptions that the process of aging can leave people alone and cut-off; that standards and expectations of middle age should be projected to older age and that aging persons should be encouraged to expand and be involved. Proponents of the activity theory hold that life satisfactions in old age are dependent upon opportunities to find substitutes for the meaningful social roles and relationships of the middle adult years that have become progressively lost (Vickery, 1972). Indeed, the importance of life satisfaction can be addressed in the following definition of successful aging which combines survival (longevity), health (lack of disability), and life satisfaction (happiness).” (Bearon, 1996). People that have reached retirement age need and want to remain active. According to Butler and Gleason (1985) “a study of 1200 people who had lived to be 100 years old concluded that “usefulness” and “work” remained the most consistently accurate of all the factors predicting survival to a very old age” (p.49).

The positive effects of volunteerism, for those of retirement age, were found in the conclusions of a survey of over 400 people over the age of 68. The findings drew these three straightforward and positive statements; volunteers are less lonely, they believe their help is vital and the benefits of volunteering exceeded their expectations (Butler and Gleason, 1985). Another study of 128 volunteers, who were between the ages of 60 and 86, found that when compared with a control group, were in better health,

burned many more calories per week, watch TV less and reported having more people in their social networks (Greene, 2006).

A Need to Contribute

When several hundreds of people in their seventies and eighties were asked two simple questions: what would you change if you could live your life over and what wisdom would you pass on, the answers fell into three categories. One of those categories was that they would make a difference. They expressed a real hunger to leave a legacy (Wilson & Wilson, 1998).

The measure of man's worth during his working years has been his ability to produce goods and services (Vickery, 1972). After retirement, a sense of worth will be based not on what he produces for the market, but on his success in achieving his own highest potential as a mature human being and on what he does that is socially useful and desirable. Deichman and Kociecki (1989) found that the following points were vital to meeting the psychosocial needs of older people:

- the need for belonging to a group and for companionship
- the need for self-determination and independent action
- the need for new experiences
- the need to be of service to others
- the need to be part of the larger community in which one lives
- the need to give and to receive affection
- the need to be useful
- the need to have status or respect
- the need to maintain continuity of life experiences

In a 1979 Harris study, 10 percent, or 2 million of the elderly sample (those over 65) expressed a desire to volunteer their services (Butler and Gleason, 1985). This was in addition to the 4.6 million elderly who already were doing some form of volunteer work. Volunteerism at its best enables people to give selflessly of themselves to others and to develop rewarding relationships and skills (Gazley and Brudney, 2005).

Mental Fitness in Old Age

As for how the brain works in older adults, we find that people do not lose massive numbers of brain cells each day as we grow older as was once thought (Kotulak, 1996). According to a study of more than 1,000 people from age 70 to 80 by Dr. Marilyn Albert, associate professor of psychiatry and neurology at Harvard and director of gerontology research at Massachusetts General Hospital, it showed that one of the factors that determines which oldsters maintained their mental agility was the feeling that what you do makes a difference in your life. It was also found that teaching senior adults new skills increased their brain power and improved their memory, which lasted for years. Although some mental abilities begin to decline after the age of sixty, others, such as verbal and numeric abilities, actually increase.

As a testament to the “mental fitness” of seniors, President Ronald Reagan, from his remarks at a White House ceremony honoring senior citizen volunteers, on June 26, 1984, gave several examples of contributions from older individuals. They included Grandma Moses who was doing brilliant work well into her eighties, Adenauer who was guiding the German economic miracle when he was in his eighties and Churchill who was at retirement age when he began to lead Britain through World War II. Reagan said that volunteer work, in 1984, was the most prevalent outside-the-home activity for

Americans 65 and over and that the majority of older people were ready to serve (Reagan, 1984). Along that same line, Gresham (1980) recalls the following:

“Each time I see the Red Cross emblem I think of Clara Barton. That remarkable person, who lived to be ninety-one, was sixty when she created the Red Cross. She was all over the world in the service of humanity after that. At eight-three, she was still going strong but was so annoyed with the federal intervention into her voluntary organization that she resigned” (p.11).

Older adults are capable and hungry to learn, to develop their abilities and to contribute to society (Cusack and Thompson, 1998). We cannot underestimate “the tremendous potential that educators of adults have for providing learning opportunities that can strengthen adults’ intellectual abilities” (Merriam & Caffarella, 1999, p.191).

How Seniors Learn Best

“Adults learn throughout their lives, with the negotiations of the transitional stages in the life-span being the immediate causes and motives for much of this learning” (Brookfield, 1986, p. 31). They learn in different ways, for different purposes at different times and exhibit a tendency in their learning toward self-directedness.

Adults have a need to be successful learners (Galbraith, 1998). A basic level of positive adult motivation to learn is that they feel willing to learn what they expect they will be able to successfully master.

The ability to be open to new situations and to cope with challenges is an extension of the educational process (Deichman and Kociecki, 1989). Elderly citizens are encouraged to learn new skills and develop new hobbies, to rekindle old interests and sharpen minds in a variety of ways. To enhance the motivation to learn, it is important to

provide consistent and prompt feedback on performance and the mastery in learning the tasks (Galbraith, 1998). How they are trained is critical to their learning. Many authors have suggested ways to make the training of senior adults most beneficial. Most agree this can be accomplished by providing both oral and written cues, such as overheads and advance organizers; using mnemonics and rehearsal strategies when introducing new material to learners; and giving them the opportunity to apply the new material as soon after the training as possible (Vickery, 1972). These senior adults can feel exhilaration in using existing skills and acquiring new ones, especially learning to understand, relate to, and deal successfully with people of different cultures and lifestyles (Butler and Gleason, 1985). Added to this is the sense of well-being experienced when they do learn and their environment both supports and encourages learning (Mackeracher, 1996).

From the time of initial contact, retirement age volunteers should be regarded as professionals. They should be screened carefully and thoroughly trained to assume their assigned tasks. A detailed job description should also be presented to them (Butler and Gleason, 1985). Senior volunteers must be given an honest evaluation of the success or failure of their work. A congenial atmosphere that provides companionship and mutual respect and the pride of being able to make a contribution, through a group, that is more significant than one can make as an individual is vital. Retirement age volunteers must be incorporated into the staff, not as appendages but as full participants, with the confidence that their roles as volunteers are sufficiently important to be fundamental to the overall goals of the program.

Retirement age volunteerism is important to society and to a successful aging process. This group shows lower absenteeism, lower accident rates and greater

organizational loyalty (Butler and Gleason, 1985). These are certainly benefits of value. As life expectancy increases, new goals will be needed in retirement. By providing a thorough orientation and training, using the appropriate methods, retirees are provided the motivation to take advantage of this period of their life to learn something new and to do charitable work. Our community will reap the benefits.

Importance of the Orientation and Training Design

Older adults are hungry to learn, have a need to develop their abilities and a desire to contribute to society (Cusack & Thompson, 1998). While some organizational management have expressed concerns that older volunteers are unreliable, have higher turnover than paid staff, produce inferior work and have higher absenteeism rates because they cannot be controlled by many of the normal employment incentives such as pay, the real reasons are more closely associated with poor training, supervision, feedback and management of volunteers (Gazley & Brudney, 2005).

Creating a good first-impression program is essential. A good orientation serves a dual role. It is the first and last chance to get a person started on the right track (Sims, 2002). A favorable beginning fuels the employee's enthusiasm, helps to reduce anxiety and connects the employee socially to the organization. This is significant as these factors contribute to higher productivity and retention (Cohen, 2003). More and more organizations are recognizing the importance and value of this first-impression program. The most successful orientation programs include dissemination of information, key staff and team member introductions and challenging assignments.

An effective orientation program should cover some specific topics: job tasks and expectations; the organization's culture and its objectives; and basic policies and procedures (Thom, 2004).

One of the steps in creating an orientation program is the importance of identifying your audience. Special groups need special orientation and the best delivery method for that group needs to be determined.

The true purpose of training design is to solve problems and one of the key elements in this process is to change behavior. The design can provide the knowledge, skills and abilities to do the job coupled with providing motivators that have the potential to encourage learners to master the duties of the job. This design must also take into account, for those of retirement age, some of the physiological variables of these learners. These include diminished auditory and visual acuity, along with other health issues, that may affect learning (Galbraith, 1998).

The teaching of adults is different than that of teaching children. Adults enter training with experience, and because of that, there are seven principles of adult learning that must be followed in the design and presentation of training (Carliner, 2003). They are as follows:

1. Their learning encompasses principles that must be addressed, by those designing training, when preparing learning programs for adults.
2. Adults learners are often pressed for time. Even those learners of retirement age are usually squeezing in learning between family or social commitments. The call of life can limit many adults investment in learning, even when they are highly motivated.

3. Adult learners are very goal oriented. Their participation in learning programs is primarily to achieve a specific goal.
4. Adult learners bring their previous knowledge and experience to the learning. The design of training must assess what learners may already know.
5. Adult learners have a finite capacity for new information. There must be careful attention to the design of the training so it does not overwhelm the learner.
6. Adult learners have different levels of motivation. The challenge in the design process is to identify the motivational level of the learners and match the content to that level.
7. Adult learners differ in their learning styles. This refers to the preference in the way a person prefers to pick up new content. Examples of these different learning styles are learning versus doing and verbal versus hands-on.

One of the most effective methods for training volunteers is on-the-job training.

With this method, a supervisor or already trained employee shows the new volunteer how the job is performed and then has that person do the job under their supervision. A major advantage of this type of training, for retirement age volunteers, is that they actually are doing the work and learning at the same time (Urbaniak, 2004).

There are generally five relatively simple steps that should be followed with on-the-job training (Urbaniak, 2004). They include:

1. Getting the trainee ready to begin learning. This can be done by explaining the importance of the job, the meaning of the job and why it must be done correctly.

2. Break down the job into specific work components and identify the key points of the job. This will clearly set the instruction pattern, reduce the teaching time, simplify the learning effort and prevent mistakes.
3. Provide a demonstration on the proper way the work is to be done. Do this in small increments to be certain each component is fully understood before moving on to the next step.
4. Allow the trainee to perform the work and give them encouragement when the tasks are completed correctly.
5. Allow the trainee's time to gradually work on their own. Quite often a buddy system can work very effectively for training retirement age volunteers.

The same kinds of management skills that seem to make paid workers want to remain in the workforce need to be mirrored in the volunteer sector. Getting them started with a thorough orientation and training is not only fair but critical to the success of the volunteer and the organization.

Chapter III: Methodology

Western Wisconsin has a significant number of organizations that currently utilize the services of retirement age volunteers. Additionally, an influx of retiring “Baby Boomers” is on the horizon. For organizations to take advantage of this influx and to sustain those retirement age volunteers presently providing service to them, an orientation and training program, if designed appropriately, will not only increase the commitment of current volunteers but potentially attract and sustain many new volunteers in this age group.

A variety of organizations must accomplish their mission with limited resources and retirement age volunteers can help an organization “stretch” their resources. Therefore, it is important that these organizations provide sufficient and appropriate guidance to prepare and keep retirement age volunteers.

The purpose of this study is to determine how the learning needs of retirement age volunteers in the Western Wisconsin area are being met in the orientation and training design provided by organizations.

This chapter is organized by first discussing the subject selection and description, followed by instrumentation, data collection procedures, data analysis and limitations.

Subject Selection and Description

The researcher had an opportunity to spend several weeks, during the last year, visiting a family member in the hospital. She was impressed with the quality, sensitivity and competency of some of the volunteers, who all appeared to be those of retirement age or older. Once the research began for this study, it was clear to the researcher that

working with volunteer coordinators from medical facilities would provide an “apples to apples” comparison of the orientation and training provided their retirement age volunteers in each of their organizations. Limiting the research in this way, reduced the breadth of organizations utilizing retirement age volunteers and provided consistency in data analysis.

The volunteer coordinator position in the medical facilities all had commonality in duties performed. The volunteer coordinators were all paid positions, some worked full-time and others part-time and had comparable, if not identical duties.

Instrumentation

A qualitative and interpretive approach was used for this study. Face-to-face interviews between the researcher and volunteer coordinators were used as the primary data collection technique. While face-to-face interviews can consume a great deal of time, they can provide more in-depth information about a topic. Interviews can also give the participants ownership in the analysis process by providing data for the study and possible improvement in their design of orientation and training.

The use of nine pre-determined questions encouraged the participants to elaborate on their experiences and thoughts regarding the orientation and training of retirement age volunteers.

Data Collection Procedures

The researcher conducted a World Wide Web search of medical facilities located in Western Wisconsin, selected “Volunteers” from each of the menus and located the phone number to call if one was interested in volunteering for the organization. The researcher then called the number listed and either obtained the name of the volunteer

coordinator so a call could be placed later or spoke directly to that person. Once the location of the medical facilities had been selected and contact with the participating subjects had been established, interviews were scheduled, on location, with the volunteer coordinators. Prior to arriving for the scheduled interview, the researcher spent a period of approximately one hour, at each medical facility, observing retirement age volunteers in their work setting. This provided the researcher an opportunity to view the volunteers in action to get a feel for their sense of pride in what they were doing, how clearly they understood their duties and the approximate age group the volunteers fell into.

At the start of the interview, the participants were briefed on the nature of the study and asked to read and sign a consent form. The participants were guaranteed confidentiality for themselves and their organizations. All participants willingly signed the consent form. This form is found in Appendix A.

Next, the researcher gave a few introductory comments and then asked a series of nine questions. The survey questions, along with the introductory comments, can be found in Appendix B. This was considered a structured interview environment and during the interview participants were asked to clarify or expand on their answers if necessary. All the verbal material from the interviews was recorded and transcribed. Participants were aware that all voice tapes would be destroyed after transcription.

Data Analysis

Responses from the voice tapes were transcribed and the resulting data from each response to the questions was scrutinized and then grouped together. A narrative analysis was then conducted and a descriptive summary of the responses was made. The next chapter contains the results.

Limitations

One limitation of this study was the inability of the researcher, due to time constraints, to contact other volunteer organizations in Western Wisconsin that utilize retirement age volunteers. Second, the study does not contain data from those retirement age volunteers that donate their time to the medical facilities that were selected. It would have been valuable to compare data from the volunteer coordinators against volunteer data in this age group.

Chapter IV: Results

The participants in this study were all female volunteer coordinators for medical facilities located in Western Wisconsin. Each of their organizations varied in size, complexity and in the number of retirement age volunteers that they utilized. Three of the volunteer coordinators (VC) were employed full-time, one worked in a half-time position and one worked eight hours a week. These last two VC's worked for the smallest medical facilities of the group. Only one VC had an additional staff member to help with the volunteers. The largest and the smallest facility were affiliated with the same medical group.

In meetings with each of the VC's, a series of nine questions were asked that would help this study to determine if the learning needs of retirement age volunteers were being met in the orientation and training design used by the organization. Each of the interviews took approximately 25 minutes. Confidentiality of the VC and their organization was guaranteed by the researcher. A descriptive summary of each of the questions follows.

When a retirement age volunteer applies for a position in your organization, what process do you use to screen the applicant?

In each of the interviews, the VC cited a very similar process for screening applicants. An application was either mailed to those potential volunteers that had made a telephone contact or it was handed out to those that arrived in person. The information on the application varied somewhat for each organization but all asked for contact information, hours available and not available, their experience with other volunteer

organizations and/or career or job background. A criminal background check was also a regular part of the application process.

VC Two (personal communication, July 6, 2006) indicated a manual is sent to potential retirement age volunteers that gives an overview of the hospital, provides the hospital mission statement, the volunteer office mission statement and how what the volunteers do at the hospital impacts the visitors, friends, patients and anyone that comes in contact with the hospital. This manual also has a health history form and contains an overview of the policies, procedures, rules and benefits of volunteering.

When you decide which applicant(s) to interview, what kinds of questions are you asking and what are you looking and listening for?

All of the VC's invite the potential volunteer for a personal interview to get acquainted after receiving a completed application and affirmative background check. At this time, the VC reviews the potential positions available for volunteering, asks for preferences and reviews the needed schedules for the positions. Often, applicants may want to volunteer for a position that does not exist, like rocking babies in the nursery. The VC then explains the security risk involved and asks if they would be interested in something else. Each applicant is also asked about their previous work history, if any, and why they are interested in volunteering. The VC is also looking for their verbal and non-verbal queues to determine if they would be better placed in the public or away from the public. Two of the VC's admitted that some of the applicants just don't fit in, although this is rare. The VC may, from these observations, find that the applicant has some skills that might be better utilized in a different situation than what has been indicated. When this happens, the VC explains the duties and skills necessary for the

different position and how she feels the applicant and position match. Two VC's indicated additional information.

VC One (personal communication, June 28, 2006) also includes a tour of the facility, a chance to watch some current volunteers in action and talks about some things that they might not understand along the way. For instance, what does Lifeline mean and how does it impact volunteers.

VC Two (July 6) indicated that one of the biggest things she is looking for at the interview is whether they have actually read the materials that were sent to them. She will know if someone is serious about being a volunteer through the questions that are asked. She is looking for their enthusiasm and commitment level and feels that if it is strong, it will mutually benefit everyone, including the patient, and save time.

Once an applicant is selected, what is the process you use to orient and train them for the position?

All of the VC's indicated that they begin with a very thorough orientation that includes a facilities tour, policy and procedure checklist, confidentiality requirements, safety procedures, infection control, etc. The volunteer then has a chance to ask questions and review some or all of the information. All of the information is included in a manual that is turned over to the volunteer for reference. In all but one case, the volunteer is then given a post test on the information to establish their understanding and comprehension of the information. This mirrors the procedure used for regular employees at each of the four medical facilities. The volunteer is then taken to the specific area that they will be working in and are given a detailed tour by either a regular staff member or experienced volunteer.

VC Five (personal communication, July 12, 2006) mentioned that the orientation, depending on how many volunteers she is working with, might be given in one of the facility's training rooms with the use of PowerPoint combined with lecture. The volunteers are also told what to wear, where to put their personal belongings, meal times and where the safety manuals are kept in their area.

The training of the volunteer varies somewhat within the organizations. Although the use of on-the-job training is prevalent throughout, it generally depends on the specific area that the volunteer is working in on how and who facilitates that training.

VC One (June 28) turns the volunteer over to a veteran volunteer or a lead worker in the volunteer department.

VC Two (July 6) provides the volunteer a job description. She then pairs the volunteer with a veteran volunteer who has had enough experience in the area and that the VC feels is adept at training another volunteer. She may also choose to use a staff member for training or a combination of both. This method gives them (the volunteer) a double comfort level and training is continued for them until they feel comfortable to handle a shift on their own.

VC Three (personal communication, July 7 2006) uses veteran volunteers and does provide some general information on broad topics like customer service. She starts the volunteer on one task at a time. When they master that, they move on to another.

VC Four (personal communication, July 10, 2006) utilizes a volunteer chairperson for training. This is a person who is in a position of being a specific department's supervisor and scheduler of volunteers.

VC Five (July 12) indicated that the training will depend on how complicated the position is. That training will always be done either by an experienced staff person or experienced volunteer. Some of the more complicated areas have a written manual for the training that is gone through with a staff person, then shadowed by that staff person or experienced volunteer and followed up with a general competency form that is signed off by the trainer, the volunteer and the area supervisor.

What, if anything, do you build into the training that you feel will motivate the volunteer?

Not all the VC's felt that they had built a motivator into the training but all of them did agree that they were providing motivation.

VC One (June 28) felt that it was talking to them and finding out their interests, checking back with them and asking how did the job go. She emphasizes to them that she really needs help with the position and thus makes it seem very important.

VC Two (July 6) said that the reason they send a packet out first and then have the volunteer contact them determines their motivation prior to beginning.

VC Three (July 7) indicated that turning the volunteer over to a department for training is what motivates the volunteer because it makes the volunteer feel part of a department and a team.

VC Four (July 10) offers a free lunch to the volunteers as a motivator.

VC Five (July 12) thinks that when the volunteers see how detailed and structured the training is, they realize the importance of what they are doing. Also, knowing that the training needs to be dated and signed off on, increases the training importance and is a significant motivator. The volunteers know that they are getting treated the same way as the regular employees and that build a pride and extra motivation.

Do you provide job aids for the volunteer once they are in the position? If so, what are they?

Each VC indicated that they are providing the volunteer with the tools necessary to do their job and succeed in it. As a general rule, a procedure list and a detailed manual is provided with all the information necessary to help refresh the memory on how to do a job or where to look for additional help. They all stated that it is an important and time consuming task to keep that information up-to-date. In the majority of medical facilities, the responsibility for updating the information fell to the VC. In one instance, the VC had an experienced group of volunteers from a specific area do a draft update and she reviewed and approved it. In addition, all VC's provide refresher courses on some of the general information, like customer service and confidentiality, to keep the importance of the information in front of the volunteer. Of course, each VC said she was available to answer any questions, at any time, that a volunteer might have.

VC Two (July 6) said that all the volunteers are good ambassadors to one another, and they help each other succeed.

How do you provide feedback on job performance to the volunteer?

Only VC One (June 28) did not have a method of providing feedback to volunteers in place. Although the regular staff of the facility, including her, had a job performance review on a bi-annual basis, she had not considered it for the volunteers. From our discussion during the interview, she said she would be implementing that in the near future. The other VC's used a combination of face-to-face communication for feedback along with a more formal evaluation process.

VC Two (July 6) uses something called “rounding” and she had her Board members assist her with this as she has a large number of volunteers. “Rounding” is the use of a scripted sheet of information that asks the volunteer the following: do you have the tools to do your job, and if not, what do you need to do it better and what do you think about what you’re doing. This can give her information about some weaknesses in orienting and training the volunteer and if there is something that is affecting one volunteer, it might be affecting others and needs to be addressed.

VC Three (July 7) tries to check in with volunteers as much as possible. In addition, if a patient survey comes back with positive comments, she always seeks out the volunteer and shares the comments. If negative comments are in the survey, she seeks out the volunteer to talk about. It may be that the training was not conducted as thoroughly as necessary.

VC Four (July 10) does an annual performance review. She also just started sending out a survey for the volunteer to fill out on the effectiveness of the VC position (reverse feedback). The facility’s newsletter also highlights some of the stellar performers in the volunteer corps.

VC Five (July 12) sends out an annual evaluation to the volunteers. Because she has such a large group of volunteers and there are just two staff members in her department, she fills out an evaluation, sends it to the volunteer and asks for their comment. They are also invited to make an appointment with her to discuss any issues. If there are performance problems between the evaluations, the volunteer is brought in to talk about what the VC can provide in further coaching or training that would be beneficial to the volunteer.

Do you have an incentive or reward system for your volunteers?

Each of the VC's indicated that a reward system was in place and that it was very important to the volunteers. The two largest medical facilities offered their volunteers pins for the number of hours of service. After an initial increment of hours was served, a pin was awarded and once the next plateau of hours was reached, an additional bar was added to the pin. Each facility also provided an annual recognition event, either in the form of a luncheon or a dinner, for their volunteers. At this event, volunteers are recognized and given small gifts of appreciation from the medical facility. Other forms of recognition include:

VC One (June 28) felt that the opportunity for volunteers to participate in any training i.e. computer programs, etc., that is offered to staff, room permitting, is a reward and benefit.

VC Two (July 6) organizes monthly "super celebrations" that recognize/highlight a special volunteer who has gone above and beyond in their service. This VC also feels that you don't have to give retired volunteers money because that is not what they are looking for. They want to be recognized for making a contribution. They want to know that they matter.

VC Five (July 12) provides meal tickets and many benefits for their volunteers. These benefits include: participation in employee activities; trips; movie theater discounts; membership in the fitness center and discounts on eye exams and glasses if done at the medical facility. Birthday cards, which include a discount coupon to the gift shop, are sent to all volunteers as well as thinking of you and thank you card when appropriate.

What do you estimate the value of retirement age volunteers is to your organization?

All the VC's agreed that retirement age volunteers were invaluable. Besides the considerable savings of dollars and time for the organization and because of their life experience, they are considered role models for other people of all ages. Since they generally know a lot of people, they are recognized at the medical facility and help to give it a friendly and welcoming atmosphere.

VC One (June 28) said that the 14,558 hours her retirement age volunteers put in last year probably did not accurately reflect an actual higher amount as many volunteers don't record all their hours. Many times when they go home and bake bars or sew or knit something in their spare time, they don't consider that an hourly contribution. They are just happy to help out.

VC Two (July 6) indicated that volunteers gave over 50,000 hours of service this last year. If those hours were figured at the \$17.09 per hour that is the mean salary for all hospital workers and adding the money raised at fundraisers throughout the year it would total over a million dollars that they are giving the hospital in a given year.

VC Four (July 10) estimated that the roughly 100 retirement age volunteers figured pretty close to a \$100,000 contribution.

VC Five (July 12) estimated an \$800,000 contribution by the volunteers.

Do you have anything else you would like to add?

Each VC felt it was a privilege to work in this capacity. They all agreed that they received real job satisfaction from working with the retirement age volunteers. Additional responses were varied and included:

VC One (June 28) was committed to giving the volunteers something meaningful to do because she wants them to volunteer at her medical facility and not elsewhere.

VC Two (July 6) felt strongly that our society could not function without the goodwill of volunteers. Her advice is to get this age group involved. If they don't know what their passion is, people like her will help them find that passion. If that passion can't be found in her organization, she will help them find an organization elsewhere that needs and wants this age group of volunteers.

VC Three (July 7) indicated that when she first started in her position she scheduled a mandatory volunteer meeting every Monday morning. Many of the volunteers had other obligations at that time and could not make the meeting. She lost a lot of good volunteers because of that. Now, for those that cannot make the meeting, she provides the information in another form, either written or verbal, so they are kept current with new information. She places a high importance on accommodating this age group.

VC Four (July 10) realizes that the more she has learned about volunteer programs and how the volunteers can serve, she has been able to do more to help the organization save time and money.

VC Five (July 12) felt that volunteer programs needed someone with credentials to manage the program. Belonging to National and State organizations will keep you up-to-date on the latest trends dealing with volunteers.

Chapter V: Discussion

This study sought to determine the extent to which organizations, located in Western Wisconsin, are providing orientation and training to meet the learning needs of retirement age volunteers. This age group is capable of new learning and has a need to be successful in those efforts. The design of the orientation and training provided to them has a great deal to do with their successful mastery of new duties and their enthusiasm to continue working in a volunteer environment.

Methods and Procedures

Data for the study was obtained through the use of face-to-face interviews with volunteer coordinators of medical facilities. This group of professionals was chosen because medical facilities typically utilize the services of retirement age volunteers and the volunteer coordinator positions are either in charge of the orientation and training given to this group or they determine how and who will facilitate the programs. Each of the five interviews were conducted either in the office of the volunteer coordinator or in a room within the medical facility where they worked. Prior to each interview, one hour was spent in the facility observing, greeting and having brief conversations with the retirement age volunteers that were working at that time.

Once the interviews were transcribed, a descriptive summary was produced that served as analysis for each of the questions asked. From the analysis, conclusions were made and will be addressed later in this chapter.

Limitations

The limitations of the study included the following:

1. The data would be limited to personal interviews conducted with volunteer coordinators in an approximate one hour time period.
2. The data would be limited to interviews, and therefore, only one data collection technique.
3. The data would be limited to the perspective of only five volunteer coordinators.
4. The date would be limited to the five medical facilities of the five volunteer coordinators.

Conclusions

The volunteer coordinators were passionate and very articulate individuals who cared deeply about their organizations and the volunteers that they placed within it. They exhibited support for a very caring environment for this age group. A strong desire for placing the volunteer in the appropriate position was evident and they all felt that a thorough orientation and training was important, not only to the volunteer, but to the organization and its reputation and ability to operate efficiently. Conclusions are further broken down to mirror the heading used in the literature review.

Importance of Meaningful Activity

The importance of meaningful activity to this age group was clearly evident to the volunteer coordinators. In each of the interviews this message came out loud and clear. Several of the volunteer coordinators mentioned that keeping busy through volunteering seemed to help maintain or improve the health of their volunteers. They also mentioned the research they had read concerning meaningful activity, improved quality of life and longer life. All the volunteer coordinators felt it was their responsibility to see that they create this kind of activity for their retirement age volunteers.

In the brief encounters with volunteers at each medical facility, the researcher heard time and again how nice it was to stay busy and it was the best way, in the opinions of the volunteers, to stay young.

A Need to Contribute

This need to contribute was signaled by the three retirement age volunteer coordinators as key to their lives and was why they loved doing what they were doing. That need helped them understand how important it was for their volunteers. The two non-retirement age coordinators also understood that this need drove many of their volunteers. All of the volunteer coordinators understood the importance of making the volunteers' feel part of the individual department staff where they worked, as well as, contributing a vital role for the entire organization. They indicated that one of the benefits of contributing as a volunteer included being linked socially with both regular staff and other volunteers. All of them observed that many of the volunteers and staff developed relationships outside of the organization which brought attention to an organizational culture that stressed the importance of the contribution of volunteers.

Mental Fitness in Old Age

None of the volunteer coordinators had any negative comment concerning a lack of mental fitness in their retirement age volunteers. For those coordinators that used a testing situation to determine orientation and training comprehension, their indication was that retirement age applicants did very well. Also, none of them indicated that the reason an applicant might not work out was due to their mental fitness. It was more likely the social prowess of the applicant would be a decider of their success in the program.

How Seniors Learn Best

It was apparent that each of the volunteer coordinators understood that their volunteers had a need to be successful learners. There were sincere efforts made to provide an environment that supported and encouraged learning. In all cases, some form of feedback was provided to the volunteer on their learning and performance, whether that be in the use of learning aids, post tests or the availability of a mentor to seek answers or refresh the memory.

Importance of the Orientation and Training Design

Several of the volunteer coordinators included, in their orientation design, much of the same information required of the regular staff in the medical facility. While this required information can be overwhelming, they all presented it to the volunteers in manageable bites. The coordinators were all eager for this to be a positive beginning that would foster continued interest in their volunteer program. In addition, an honest effort was made on their part to reduce anxiety for the volunteer and to make them feel a valued part of the organization. Since a key to a successful orientation program includes the dissemination of information, introductions to key staff and team members and the availability of challenging assignments to those interested in them, all the coordinators made, to the best of their ability, attempts to design this into their orientation program. Their choice of delivering this information was either in one-on-one meetings with the volunteer or in small groups. Both seemed to be effective for the volunteer's needs.

As for the training design used for the volunteer positions available, consideration was given to the amount of information provided at one time so as not to overwhelm the new learner. The use of on-the-job training was prevalent and is considered one of the

most effective methods for training. The teaming of a new volunteer with an experienced one or with a staff member provided mentoring for successful learning. It appeared that each coordinator provided the steps necessary for on-the-job training for their new volunteers. Each new volunteer was adequately prepared to begin learning. They were given an explanation of the job and its importance. The duties were broken down into learning segments and followed a specific pattern that would simplify the learning and prevent mistakes. Generally, a demonstration was given to the new volunteer, they were then given an opportunity to complete the task and feedback was provided on whether additional learning was necessary or they could move on to the next step. New volunteers were then gradually left to work on their own once they had developed a comfort level in the position and, in many cases, had taken a post test to evaluate their learning.

It was apparent that this group of volunteer coordinators was meeting the learning needs of retirement age volunteers by using appropriate design techniques in their volunteer orientation and training programs.

Recommendations

The scope of this study could be broadened, and the results compared, to other volunteer organization groupings utilizing retirement age volunteers such as: senior centers, food pantries, hospice, public schools, religious organizations and civic or political organizations. This would provide more comprehensive data that could be shared with organizations to prepare them for the influx of the baby boomer generation to their potential to volunteer.

The results of this study could also be used by another researcher to develop a program to market the use of volunteers to those organizations not currently utilizing

them. This study just scratched the surface in discovering the significant organizational savings in both time and personnel that can be harnessing by the use of retirement age volunteers.

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Appendix A: Consent Form

This research has been approved by the UW-Stout IRB as required by the Code of Federal Regulations Title 45 Part 46.

CONSENT FORM

You are invited to participate voluntarily in a study of the orientation and training for retirement age volunteers, which is being conducted by Candice Wilson as part of her M.S. research at the University of Wisconsin-Stout.

Your participation will involve one interview discussing how you orient and train retirement age volunteers and what your perceptions are concerning how several possible resources could meet the needs of the organization and the needs of the volunteers.

Any verbal material gathered during the interview will be recorded and transcribed. The material will be kept strictly confidential.

The transcripts of the interviews may be kept indefinitely, but no one will have access to the data except the researcher. All voice tapes will be destroyed once the material has been transcribed.

No specific organizations/agencies or staff will be identified in the study.

The researcher may authorize publication of quotations from the transcripts in appropriate cases.

Any questions you may have about the project will be answered by the interviewer to the best of her ability. You understand that you are free to not answer any questions at any time.

Your decision whether or not to participate will not affect your current or future relationships with the University of Wisconsin-Stout. If you agree to participate, you are free to withdraw at any time without affecting that relationship.

Questions or concerns about participation in the research or subsequent complaints should be addressed to Candice Wilson (researcher), 715-962-3019 or wilsonc@uwstout.edu, or to Tom Allen (Research Advisor), 715-232-2273 or allent@uwstout.edu, or to Sue Foxwell, Human Protections Administrator, UW-Stout Institutional Review Board for the Protection of Human Subjects in Research, 152 Vocational Rehabilitation Bldg., UW-Stout, Menomonie, WI 54751, 715-232-2477 or foxwells@uwstout.edu.

You have read the above agreement. You understand what is being asked of you and you are willing to participate in this research and to have the materials used in the ways described above.

By signing this consent form you agree to participate in the project entitled, *Study to Determine how Organizations, in Western Wisconsin, that Utilize Retirement Age Volunteers are Designing their Orientation and Training Programs to Meet the Learning Needs of this Group.*

Signature

Date

Appendix B: Interview Questions

INTERVIEW QUESTIONS

1. When a retirement age volunteer applies for a position in your organization, what process do you use to screen the applicant?
2. When you decide which applicant(s) to interview, what kinds of questions are you asking and what are you looking and/or listening for?
3. Once an applicant is selected, what is the process you use to orient and train them for the position?
4. What, if anything, do you build into the training that you feel will motivate the volunteer?
5. Do you provide job aids for the volunteer once they are in the position? If so, what are they?
6. How do you provide feedback on job performance to the volunteer?
7. Do you have an incentive or reward system for your volunteers?
8. What do you estimate the value of retirement age volunteers is to your organization?
9. Do you have anything else you would like to add?