

Curriculum Vitae for Andrea L. Jones, MSW, LSW

Education

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(May 2013 anticipated completion)
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Exploration of a Complex Volunteer Task
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- 2012 - present **University of Maryland School of Social Work**
SWCL 744 Psychopathology co-taught with Deborah Gioia, Ph.D.
- 2011 – 2012 **University of Maryland School of Social Work**
SOWK 783 Qualitative Cross-Cultural Research
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FMST 614 Family Studies Graduate Research Methods
- 9/05 - 5/08 **Montgomery County Community College**, Blue Bell, PA
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HSW 202/204: Theories and Application of Individual Counseling
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Direct Social Work Practice Experience

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System
- 2006 – 2008 Spirit of Gheel, Inc., Kimberton, PA
Clinical Director for therapeutic residential community for persons with
persistent mental illnesses
- 2000 – 2006 Intervention Associates, Wayne, PA

- Executive Director for a large, private 501c3 care management agency
- 1998 – 2000 Senior Behavioral Health, Mercy Community Hospital, Havertown, PA
Program Director for a geriatric psychiatry unit
- 1995 – 1998 Geropsychiatric Consultants, Friends Hospital, Philadelphia, PA
Case manager and psychotherapist for inpatient and outpatient private practice
- 1991 – 1995 Eugenia Hospital, Lafayette Hill, PA
Program Director of geriatric day program, intergenerational program and inpatient adolescent psychiatry group therapist
- 1990 – 1991 Fox Chase Cancer Center, Philadelphia, PA
Social Work Practicum in oncology
- 1989 – 1990 Friends Hospital, Philadelphia, PA
Staff social worker on general psychiatry unit and social work practicum on geriatric psychiatry unit

Grants, Fellowships, and Awards

- 2012 Maryland Gerontological Association Student Research Award (\$1,000).
- 2011 John A. Hartford Doctoral Fellowship (\$70,000).
- 2011 University of Maryland School of Social Work Dissertation Grant Award (\$4,000).
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Research Interests

Volunteerism, civic engagement, and service learning. Development, dissemination and evaluation of community programs supporting vulnerable older adults. Veterans' issues. Intergenerational programs and multi-generational co-housing. End-of-life decision making and health policy.

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- 2010 –present Graduate Research Assistant
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Principal Investigator: Amy Cohen-Callow, Ph.D.
Assist in implementation of program evaluation for older adult volunteerism research funded by Atlantic Philanthropies and the Baltimore Community Foundation. Provide all qualitative data and analysis of same to support this project. Assist in developing new research related to

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2008 – 2010 Graduate Research Assistant
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Provided manuscript preparation assistance for NIH grant to design and implement childhood asthma intervention

Publications

Svoboda, D., Williams, C., Jones, A., & Powell, K. (in press). Teaching social work research through practicum: What the students learned. *Journal of Social Work Education*.

Jacobson, J., Osteen, P., Jones, A., & Berman, A. (2012). Evaluation of the Recognizing and Responding to Suicide Risk training. *Suicide and Life-Threatening Behavior*, 42, 1-15.

Svoboda, D., Jones, A., van Vulpen, K., & Harrington, D. (2012). Programmed instruction. In: J.A.C. Hattie and E.M. Anderman (Eds.), *The international guide to student achievement*. New York: Routledge Publishers.

Jacobson, J., Jones, A., & Bowers, N. (2011). Using existing employee assistance program case files to demonstrate outcomes. *Journal of Workplace Behavioral Health*, 26(1), 44-58.

Jacobson, J., & Jones, A. (2010). Standards for the EAP profession: Isn't it time we all started speaking the same language? *Journal of Workplace Behavioral Health*, 25(1), 1-18.

Reports

Cohen-Callow, A., & Jones, A. (2012). Neighbors in Deed Pilot Project: Baltimore Site for the Community Experience Partnership – Community Solutions Project (CEP). Second year interim report.

Cohen-Callow, A., & Jones, A. (2011). Neighbors in Deed: Baltimore Site for the Community Experience Partnership – Community Solutions Project (CEP). A first year report on a program evaluation for the Baltimore Community Foundation.

Presentations

Jones, A. (2012). Volunteer guardians: Service pioneers. Presented at the Gerontological Society of America International Conference, San Diego, CA.

Jones, A. (2012). Volunteer guardians in the community: Social service agency partners. Presented at the Council on Social Work Education Annual Conference, Washington, DC.

Cohen-Callow, A., & Jones, A. (2012). Driving community change: Leveraging baby boomers in non-traditional volunteer activities. Presented at the Gerontological Society of America International Conference, San Diego, CA.

Jones, A. (2012). Volunteer guardians model for practice: Invited presentation to Montgomery County, Maryland Department of Health and Human Services Area Agency on Aging.

Jones, A. (2012). Volunteer guardians in the community: Developing a model program. Presented at the Maryland Gerontological Association Annual Conference, Baltimore, MD.

Jacobson, J., Osteen, P., Jones, A., & Berman, A. (2012). Evaluation of the RRSR training (recognizing and responding to suicide risk): Changes in attitudes, self-efficacy, and practice skills among clinicians. Paper presented at the 2012 American Association of Suicidology Annual Conference, Baltimore, MD.

Cohen-Callow, A., & Jones, A. (2011). Developing older adult civic engagement initiatives in urban community based settings: Testing a pilot project. Presented at the Gerontological Society of America (GSA) Annual Conference, Boston, MA.

Cohen-Callow, A., & Jones, A. (2011). Innovative workforce strategies for capacity building in nonprofits and public agencies. Presented at the National Network for Social Work Managers 22nd Annual Management Institute, Baltimore, MD.

Cohen-Callow, A., Casado, B., Edds, R., Macgill, J., & Jones, A. (2010). Neighborhoods for all ages: An initiative for senior supportive neighborhoods. Presented at the Gerontological Society of America (GSA) Annual Conference, New Orleans, LA.

Professional Associations

- Gerontological Society of America (GSA)
- Association for Gerontology Education in Social Work (AGESW)
- Society for Social Work Research (SSWR)
- Council for Social Work Education (CSWE)

- Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA)
- National Association of Geriatric Care Managers

Professional Service

2011 Journal reviewer for *Nonprofit Management and Leadership*.

Service to The University of Maryland, School of Social Work

2011 –present Student representative to the University of Maryland, Baltimore and University of Maryland Baltimore Campus Gerontology Interest Group.

2010 – 2011 Student representative to the University of Maryland School of Social Work Doctoral Program Committee. Developed and implemented professional development speaker series.

2010 Komen MD Community Profile 2010/2011. Breast cancer awareness focus group facilitator.

2009 –present Student member of the School of Social Work's Aging Interest group.

2009 Komen MD Community Profile 2009/2010: Breast cancer survivor focus group facilitator in collaboration with Deborah Gioia, Ph.D., Principal Investigator.

2009 Baltimore Community Foundation Neighborhood Indicator Alliance/Baltimore Community Engagement Initiative: Asset mapping project in six Baltimore neighborhoods facilitated by Amy Cohen-Callow, Ph.D.

Service to the Community

2009-present Siamese Rescue, a national rescue organization: Volunteer
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Licensure, Certification, Training

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- Certified Care Manager – National Academy of Certified Care Managers

Abstract

Demographic trends indicate a significant increase in the number of adults over 65, especially those 85 and older (Federal Interagency Forum on Aging-Related Statistics, 2010). Community services may be reduced or eliminated due to fiscal constraints (NGA, 2010). Recruiting and retaining volunteers to act as legal guardians (VGs) for incapacitated older adults may be essential in meeting increased community service demand for guardians.

This mixed method study built upon prior research to include themes of qualitative semi-structured interviews and quantitative results from the Volunteer Functions Inventory (VFI; Clary et al., 1998; Clary, Snyder, & Stutkas, 1996) with VGs from a mid-Atlantic not-for-profit guardianship agency. Quantitative data suggest VG motivations score higher than the comparison sample on subscales measuring factors, such as Values (humanitarian, altruistic reasons), and lower than comparison sample on the Career, Enhancement, and Protective factor subscales. Qualitative data were collected using a semi-structured interview guide and analyzed using the Generic Inductive Qualitative Method (Hood, 2007). Interviews conducted with 12 volunteer guardians indicated themes related to why VGs chose this task, such as ‘helping the unbefriended (Values factor),’ ‘giving back/paying forward,’ and ‘learning to help.’ Themes illustrative of how the guardians performed this volunteer task included ‘how they with conflict,’ ‘need for a good match (client to volunteer),’ and ‘asking for help.’

In addition, findings seem to indicate that volunteers with human service training employed a more directive case management style. Volunteers without human service training provided more collaborative, functionary guardian services. Qualitative interview data were also collected from six board and agency staff and indicated a difference in perception between administration and VGs related to the 'need for a good match,' as well as 'recruitment' methods.

Implications for practice include the need to provide more support and assistance to volunteers without human service training, understanding the need for guardian-client matches that would be more compatible with the guardian type, as well as a need for improved, specific recruiting methods. Implications for future research include the development of a model to recruit and train volunteer guardians that could be replicated by social service, faith-based, and other not-for-profit agencies.

Volunteer Guardians in the Community: A Mixed Methods Exploration of a Complex

Volunteer Task

by

Andrea L. Jones

Dissertation submitted to the faculty of the Graduate School
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fulfillment of the requirement for the degree of
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Chapter 1: Introduction

Volunteer guardians engage in positions of high responsibility requiring significant commitment as court-appointed advocates exercising substituted judgment on behalf of older adults who are no longer able to act on their own behalf. Anecdotally, many of these volunteers are older adults themselves, and may view volunteering as an opportunity to provide service to their peers. There is also a subjective belief that many of these volunteers are retired professionals, including clergy, social workers, and nurses. However, to date little empirical evidence is available to understand who these people are, and why they are willing to give of their own time to provide this highly needed service to strangers in the community. This study explored the reasons why volunteer guardians engage in and continue in this very demanding position.

Description of the Role of Volunteer Guardian

Volunteer guardians assume a more responsible role than would be expected of occasional volunteers or of volunteers who fulfill more administrative roles, such as library volunteers or parents who volunteer for school committees. Guardianship would not be requested or granted unless an individual was deemed to be incapable of making personal decisions. In social work practice, this may present as older adults who may be living in substandard housing, which by virtue of their cognitive loss may not be orderly and clean. Personal hygiene may be lacking. There may be issues relating to malnutrition, substance abuse, substandard health care, and an inability to follow medical

protocol and instructions for wound care and medication. In addition, many older adults succumbing to dementia are not aware of their diminished decisional capacity, and may be irritable, agitated, oppositional, and uncooperative. Recent research indicated that behavioral symptoms are prevalent in 57% of patients diagnosed with a dementia (Okura et al., 2010). Delusional symptoms, such as paranoia and hallucinations, may be prevalent in up to 25% of patients diagnosed with a dementia, and may make an individual suspicious, obstreperous, and combative (Beers & Berkow, 2000). If a prospective client is waiting for a hospital discharge, there may be no safe home to return to, instigating the need to secure a nursing home placement.

Although the guardianship picture may be complicated for an unbefriended client (defined as a client with no involved family or friends), the situation for someone with involved family who have been accused of malfeasance of some kind may be additionally complicated by the burden of angry, spurned family. In general, there are significant issues with regard to time and responsibility on the part of the volunteer, as well as issues of conflict emanating from the client and/or the client's next of kin.

Moreover, there are usually not enough community resources, such as community-based home care, delivered meals, and safe, affordable housing, often necessitating patchwork solutions to keeping someone safe enough to remain in the community. Volunteer guardians must be conversant in issues relating to the medical, legal and social aspects relevant to a client's life. In addition to all of these challenges, this client, a stranger to the volunteer, may not be cooperative or able to engage adequately with the volunteer.

Aging Trends

The cohort of Americans born between 1946 and 1964, commonly referred to as Baby Boomers, represented a large increase in the post-war population that is now becoming a significant retirement trend. By 2030, 71.5 million Americans will be 65 or older (Wan, Sengupta, Velkoff, & DeBarros, 2005). It was estimated that in 2002 13.9% of adults 71 and older suffered from dementia (Plassman et al., 2007). As the older adult population increases and moves into advanced old age, it may be assumed that the incidence of diminished cognitive capacity related to dementia will also increase.

The Great Recession of 2008 may have severely affected state and local budgets and the programs they finance, often the frontline providers of community-based and long-term care services for older adults. Community agencies that had provided public guardianship services may be subject to funding cuts. A recent report from the National Governors Association (NGA, 2010) indicated state budgets would be reduced to \$612.9 billion in fiscal 2010, \$74.4 billion less than in fiscal 2008. If there are budget shortfalls for community-based and long-term care services for older adults, many may be living in the community with less support, and with diminished ability to make appropriate decisions affecting their finances and healthcare. A fee-for-service industry has arisen to provide guardianship to those who can afford it (Smith & Kohl, 2007). However, many older adults cannot afford to pay for professional services of any kind.

Fortunately, capacity for volunteerism in the U.S. may also increase simply by virtue of the increasing number of older adults available to volunteer. A special volunteer population will need to be recruited and trained, however, to meet the needs of incapacitated older adults. Volunteer guardian programs are uncommon and empirically

uncounted. Some exist as an adjunct to a state or local public agency. For example, the Kansas Guardianship Program has trained volunteer guardians to work in partnership with the State's Department of Social and Rehabilitation Services for the past 30 years (State of Kansas KGP Annual Report, 2009). Another example is Guardianship Services, Inc (GSI). Located in Fort Worth, TX, GSI provides volunteer and fee-based guardian services to people of all ages (Guardianship Services, Inc., 2010). This agency was created as an entity within the Area Agency on Aging in Tarrant County, TX, but has since incorporated as its own not-for-profit agency providing guardianship services, as well as services of a less restrictive nature, such as money management and representative payee services.

Exploring Motivation to Volunteer as a Guardian

Qualitative perspective.

Volunteer guardians may offer a potential solution to meet the needs of community-based and institutionalized older adults who may benefit from guardianship services. In an effort to better understand the motivation of volunteers as guardians, a search of the research literature was conducted. No empirical evidence was found regarding volunteer guardians.¹ To recruit and retain them, it may be important to understand why they are motivated to volunteer for such a complex and demanding task. To this end, this study used a qualitative semi-structured interview approach guided by a grounded theory technique, the Generic Inductive Qualitative Model (GIQM; Hood, 2007), to interview current and former volunteer guardians. GIQM, which will be

¹ A search of 20 gerontology-themed journals was conducted on December 24, 2012 using electronic databases at the University's Health and Human Services Library. Keywords used were 'volunteer' and 'guardian'. No relevant results were found.

addressed more fully in Chapter 2, uses techniques associated with grounded theory, and as such, has its theoretical roots in symbolic interactionism.

Symbolic interactionism as developed by Mead, Dewey, Cooley, James, and other Chicago School theorists, poses a perspective to understand individual human behavior within the context of a larger society (Blumer, 1971, 1980, 1986; Turner, 1976). Essentially, behavior is shaped by continuous social interactions wherein people learn to construct a social reality based on meanings of symbols (Ritzer, 1992). As interactions are ongoing, meanings change and shift, offering the possibility of constant interpretation which, in turn, shapes behavior. Ritzer further notes that it is this iterative process, with its intertwined relationships and patterns of acting and interacting that shape society, reflecting Mead's position that society affects self and self affects social behavior.

Volunteerism may be described as a multi-dimensional role. It encompasses both individual psychological characteristics, as well as perception of society, societal needs, and our role in society. Our perception of society is shaped by our social interactions, the meanings we derive from these social interactions, and the impact these interactions have on our changing sense of identity. Blumer (1986) employed a mostly phenomenological perspective to shape his theory of society essentially noting that we act based upon our understanding, interpretation, and analysis of our perception of what things mean. The social world consists of the physical, social (roles), and abstract constructs, such as customs and traditions, which we use to define our personal worlds.

Cooley (1962) also noted that our values and ideals are shaped by our primary group association (i.e., the group with whom we most closely identify). In addition, Cooley coined the term 'looking glass self,' noting that our identity is shaped based our

perception of how others see us. Therefore, volunteer guardians may derive a sense of pride in their endeavor based on the perception that others find the role to be important and worthwhile. As such, volunteers may be interested in pursuing a task that has no financial remuneration or direct benefit to those they know, because they identify with a role symbolically regarded by society as altruistic and positive.

Moreover, the work of Stryker (1987, 2007) employed a symbolic interactionist perspective to develop a theory of role choice, identity theory. Identity theory has been used in research by Callero (1985) and Grube and Piliavin (2000) to examine volunteer role choice. This perspective seemed valid for this research, and is explained in more detail in Chapter 4.

Quantitative perspective.

This analytic process was also informed by a body of existing research on volunteer motivation, the functional framework of volunteerism developed by Clary et al. (1998). The functional framework best addresses the research questions and results at the level of individual or personal characteristics. This framework will be discussed later in this Chapter and in detail in Chapter 2.

The qualitative interviewing process included questions regarding the following:

- The volunteers' experience as guardians;
- What led them to become volunteer guardians and how the experience has affected them;
- Their experience with difficult and satisfying situations related to volunteering as guardians;
- What things have helped them with this task;

(Interview questions and probes discussed in detail in Chapter 2, and are available for review in Appendix A.)

In addition to the interview, the participants were asked to complete a short demographic questionnaire, as well as two brief surveys. The content of the surveys will be discussed in Chapter 2.

Significance of Need for Guardianship Services and Supporting Research

In 2005, it was estimated that 37 million Americans, 12% of the population, were age 65 and older, and that demographic group is expected to grow to 71.5 million or 20% of the population by 2030 (Wan et al., 2005). This growth highlights the possibility of calling upon more older adults to volunteer, and it speaks to the challenges of attempting to assist an increasing number of at-risk older adults in the community. As the older adult population increases and moves into advanced old age, the incidence of diminished cognitive capacity related to dementia will also increase. In an international research study regarding the incidence of dementia that included a systematic review and a Delphi panel, the authors concluded that, “24 million people have dementia today [2005] and that this amount will double every 20 years to 42 million by 2020 and 81 million by 2040, assuming no changes in mortality, and no effective prevention strategies or curative treatment” (Ferri et al., 2005, p. 5). Older adults, who may be at increased risk of self-neglect including inadequate nutrition and medication compliance secondary to advancing cognitive loss, will require greater supports and services to remain as independent as possible for as long as possible.

The need for guardianship services may also be increasing. More older adults are living alone eliminating the possibility of caregiver oversight (Federal Interagency Forum

on Aging, 2008). Americans 65 and older have traditionally belonged to a generation of homeowners. Approximately 80% owned their own homes as noted by Census Bureau data cited in recent research by Partners for Livable Communities (2007). As spouses and life partners die, however, living patterns change. In recent research conducted by the Pew Research Center (2009), “30% of adults ages 65-74 say they live alone, compared with 66% of adults ages 85 and above” (p. 10). Furthermore, more than 90% of their respondents 65 and older lived in their own residence and not in supportive congregate housing. In addition, many older adults may live at a distance from relatives who could help, or have relatives with little or no capacity to help. This has been a particular challenge for retirement states, such as Florida (Keyser, 1987).

Predictors of need for guardianship services.

Research has indicated advancing age, poverty, lower education, and living without a spouse as risk factors for self-neglect (Pavlou & Lachs, 1998), and also as predictive of those older adults who may possibly require guardianship services (Reynolds, 2002). As age increases, older adults may be less physically active and consequently more socially isolated, increasing the opportunities for self-neglect and potentially for physical danger to themselves and neighbors. Older adults advancing in age may also experience memory loss increasing the health risks to themselves and potential safety risks to others. Memory impaired older adults may neglect their own nutrition and self-care, exacerbating health issues, endangering their own health, and driving up healthcare costs (Naik, Teal, Pavlik, Dyer, & McCullough, 2008).

Societal outcomes relative to increasing incidence of dementia.

Dementia is associated with increased hospitalizations secondary to falls, poor nutritional status, and behavioral problems (Nourhashemi et al., 2001), and thus with a potential need for guardianship services. Medications may be misused creating potentially life-threatening medical consequences (Pavlou & Lachs, 1998) and increased hospital admissions (Rogers et al., 2009). In addition, the incidence of alcohol and drug abuse is rising among older adults (Choi & Mayer, 2000; Just, 2006). Substance abuse may further impair cognitive skills and increase risk.

Older adults may overuse hospital services to treat medical issues arising from self-neglect. A study aimed at educating primary care physicians regarding risk factors predictive of older adult self-neglect noted a range of frequent occurrences, among them, dementia, mental illness, substance abuse, sensory and physical impairments, isolation, and other social issues, such as poverty, low education, and adverse life events (Pavlou & Lachs, 1998). Hospitals and taxpayers are not only burdened by increased healthcare costs, but hospitals bear the additional burden of securing supportive discharge plans for older adults who may be in need of surrogate decision-making services. Many of these older adults may be prematurely institutionalized in long-term care facilities, denying them basic civil liberties, and driving up public long-term care costs (Rosenberg, 2009). Then, the burden of determining their healthcare and other needs rests on long-term care facility staff.

As noted previously, factors related to aging, such as chronic illness and social isolation are closely associated with increased hospitalization and with higher rates of institutionalization in long-term care facilities. For those who qualify, either by virtue of

indigence at the time of admission or a spend-down of personal funds, state Medicaid monies were expected to pay for long-term care nursing homes stays for approximately one million residents in 2009 (Smith, Gifford, Ellis, Rudowitz, Watts, & Marks, 2009). As of fiscal year 2009, the Center for Medicare and Medicaid Services (CMS, 2009) indicated that costs for institutional long-term care represented approximately 17% of its 372 billion dollars in payments. The National Clearinghouse for Long-Term Care Information (2009) estimated that in 2009, the cost of a semi-private room in a nursing home was approximately \$198 per day. Many regions are implementing ‘Medicaid waiver’ programs that channel funds to home care as a diversion from institutionalization. Although these funds may also be jeopardized due to economic circumstances, Medicaid waiver expenditures may help prevent premature and permanent institutionalization and may, in the end depending upon the amount of care required in the community, be considerably less expensive than institutionalization (Kaye, LaPlante, & Harrington, 2009). Both the Wingspan Conference (Cappiello, 2002) and researchers at the University of Kentucky (Teaster, Wood, Lawrence, & Schmidt, 2007; Teaster et al., 2005) note that Medicaid waiver funds should be considered as a funding stream for guardianship programs.

Definition of guardianship and process of adjudication.

So far, the significant need for increased guardianship services has been expressed in terms of social and medical determinants. However, guardianship is a legal term, as succinctly defined by Rosenberg (2009): “Adult guardianships involve a person who is alleged to be incapacitated to such an extent that she is unable to make particular decisions about property and personal needs” (p. 5).

After a petition is filed representing acknowledgement that someone may no longer be able to make sound decisions, certain criteria must then be satisfied to finalize this process. The outcome is an adjudication of incapacity, necessitating the search for a suitable guardian. States exercise this process differently (Bovbjerg, 2006; Rosenberg, 2009; Teaster et al., 2007). This may complicate interstate use of and transfer of guardianship powers. Search for and selection of suitable guardians, and post-assignment monitoring also vary widely by state. An adjudication of incapacity, although uniformly defined in legal terms, is established based on different criteria in different states. Some states have enacted the use of a functional definition of capacity based on what tasks people can and cannot perform, as recommended by Wingspan (Cappiello, 2002), a national conference convened to review national guardianship initiatives. Many states, such as Pennsylvania and West Virginia, use a medical definition (i.e., a diagnosis) to determine incapacity. In general, if guardianship is granted, it may be temporary and limited to personal or financial decisions, or it may be permanent and with few exceptions limitless; decisions vary by jurisdiction. As noted by Smith and Kohl (2007):

Guardianship is the purview of state court systems. Judges retain broad discretion in conducting these proceedings, determining incapacity, limiting a guardian's power and monitoring established guardianships. As a result, both front end [determining incapacity] and back end [guardian assignment and monitoring] of this process can vary significantly from state to state, court to court, and judge to judge. (p. 8)

Suffice it to say, guardianship implies the loss of individual rights and liberties as noted in the United States Constitution, and as such, is generally not issued without due consideration (Fell, 1994; Rosenberg, 2009).

As a legal process, a petition must be filed with a specified court. This process may be separate from guardianship assignment. However, it is possible that a hospital

vis-à-vis an unsupported discharge plan, or a local social service agency by virtue of a report of abuse or neglect, may act as petitioner (Rosenberg, 2009; Teaster et al., 2007). In addition, in some jurisdictions, social service agencies may assume guardianship. More often than not, this occurs in situations when a suitable private guardian, such as a family member or friend, has proven untenable or is not available.

This is the model of public guardianship that prevails in the majority of jurisdictions, and on occasion, these social services agencies use volunteers, most often to monitor the activities of court appointed guardians.² However, some public agencies train and supervise volunteer guardians. There are also agencies, not directly associated with a local, county, or state agency, that offer volunteer guardian services. That each jurisdiction processes these petitions idiosyncratically, using different criteria, and then has different methods and models available at its disposal to assign court appointed guardians, leads to a dizzying array of complex legal requirements, and in many jurisdictions little or no oversight once a petition is approved.

Research on Guardianship and Guardianship Models

There is scant empirical research on public guardianship. A landmark study published in 1981 demonstrated that most guardianship relationships benefitted the guardian (usually financially), who was more often than not, a relative (Schmidt et al., 1981, as cited in Teaster et al., 2008). There was very little oversight until a series of articles in the mass media appeared in 1987 that focused on misuse and abuse. A congressional panel and national guardianship symposium were convened in 1988. As a

² For a breakdown of models used by states, please refer to Teaster, P., Wood, E., Schmidt, W., & Lawrence, S. (2008). *Public guardianship after 25 years: In the best interest of incapacitated people? National Study of Public Guardianship*. Chicago, IL: The Retirement Research Foundation.

result, due process was enhanced; petition orders were more often tailored to meet the needs of the clients and were also frequently time-limited. In response to this focus, more local governments began to assemble a public guardianship process. Two seminal GAO reports published in 2004 and 2006 (Bovbjerg, 2006) noted the interstate issues, lack of data on proceedings, and lack of collaboration between state courts and federal programs (e.g., Social Security, which operates a representative payee program to assist incapacitated older adults with disbursement of public funds for long-term care placement and medical care).

A seminal national study of public guardianship was conducted by researchers at the University of Kentucky (Teaster, Wood, Karp, Lawrence, Schmidt, & Mendiondo, 2005; Teaster, Wood, Lawrence, & Schmidt, 2007; Teaster, Wood, Schmidt, & Lawrence, 2008). Researchers conducted interviews with key stakeholders in 51 jurisdictions nationally then conducted in-depth interviews with informants in 7 states, followed by site visits and focus groups in Florida, Kentucky, and Illinois. Among their conclusions, they assert that assigning a public agency as guardian may represent a conflict of interest with regard to equitable provision of service. Referred to as ‘the social service agency model’, agencies are more frequently appointed as guardian in the absence of a more appropriate alternative (Teaster, Wood, Schmidt, & Lawrence, 2008). These authors note that agencies using public funds may rely on a ‘clients served’ count causing increases in petitions, and may actively pursue potentially less problematic or more financially lucrative clients, in the case of agencies that accept client fees based on needs assessment. Nevertheless, the social service agency model is the first line of defense in the absence of more appropriate alternatives. The authors note that “28 or

more of the 41 states with a public guardianship statutory provision name a social services, mental health, disability, or aging services agency as guardian, or as the entity to coordinate or contract for guardianship services” (Teaster et al., 2007, p.19).

Among the findings by Teaster, Wood, Schmidt, and Lawrence in the 2008 report were: Forty-eight states have some form of public guardianship, that is to say the government provides some sort of funding representing a 70% increase from the original Schmidt et al. (1981) report; of the four types of guardianship program models (court, county, independent, and social service agency), social service agencies were used as the default model in 33 states, representing a significant shift toward agency usage; the majority of those agencies rely on federal and county monies, as well as funding from grants, foundations, private donations, clients fees and estate recovery fees, and as such were chronically underfunded; and, because public programs are generally involved as a last resort and are publically funded agencies, they are generally compelled to accept new guardianship cases regardless of their staff to client ratio. As public guardianship via a social service agency is the model used in most states, and these agencies are chronically understaffed and underfunded, neglect and abuse especially in combination with little oversight may be much more prevalent than can be ascertained (Teaster et al., 2007).

It is not possible to know how many public guardianship programs use volunteers as guardians, or how many stand-alone agencies provide volunteers as guardians. A state-by-state search conducted for this study noted several types of programs using volunteers; some as comprehensive as the state of Kansas’ volunteer guardianship program that has been in place for more than 25 years, and has more than 800 volunteer

guardians (State of Kansas, Kansas Guardianship Program, 2009).³ Mostly, these programs exist in very limited regional areas and have a very small number of guardians. States such as Virginia, Wisconsin, Ohio, Indiana, and Rhode Island, for example, have programs in various areas of their states that are either entirely operated using volunteer guardians, or have a few volunteers who are guardians. Some have training programs; some are connected to the state court system and a social service agency. Rhode Island, for example, operates Good Samaritan Guardianships for Cognitively Impaired Elders using a staff of trained volunteer guardians. The organization operates in conjunction with a local mental health agency (Rhode Island Volunteer Guardianship Program, 2012).

The origin of these programs seems to have been a program instituted in 1990 by AARP and the Legal Counsel for the Elderly (Karp & Wood, 2008). This program, the National Guardianship Monitoring Project, created model monitoring programs in 53 courts nationwide. AARP trained volunteers to monitor court-appointed guardians. Though the program seemed successful in that it “demonstrated improved capacity for monitoring” (Smith & Kohl, 2007, p. 28), it was discontinued in 1997. What remains is a patchwork of local programs, some of which monitor guardians, and some of which actively seek out and train volunteers to act as guardians. For example, the state of Ohio has three separate programs in different areas of the state. Lutheran Social Services of Northwestern Ohio (2009) trains volunteer guardians. However, in Columbus, Ohio (Fairfield and surrounding counties) volunteer guardians are associated with the local Area Agency on Aging (Volunteer Guardianship Program, 2010), and Butler County,

³ Search conducted December 2012 using internet-based search engine and keywords ‘volunteer guardian’ and name of state.

Ohio trains volunteer guardians who work with a local mental health agency (LifeSpan, 2010).

Research on types of guardianship clients.

Prospective guardianship clients may have family and friends available and involved. However, there may be indications, either prior to the assignment of guardianship or post-assignment, of malfeasance on the part of the parties involved with the older adults. Malfeasance may include physical abuse or neglect, emotional abuse, and neglect, as well as financial exploitation (Karp & Wood, 2008). A finding of malfeasance may necessitate the search for an objective third party to act as guardian. When an older adult requires guardianship services, but no one is available to act as guardian, he or she is referred to as “unbefriended.”

The plight of unbefriended older adults is described in detail by Karp and Wood (2010). Although they note an uncountable number of older adults living in the community without support, their study focused primarily on the rapidly growing number of older adults who are institutionalized in long-term care facilities. These residents are generally institutionalized because they are medically frail and/or suffering from dementia. Karp and Wood focused on the dilemma confronted by facilities that are faced with surrogate decision-making regarding healthcare and finances for these residents. The authors report, “experts have speculated that nearly three to four percent of the total nursing home population is unbefriended” (p. 3).

Unfortunately, facilities acting as de facto guardians may tend toward a default position with regard to healthcare decisions for residents who are unable to clearly indicate their own decisions, which may be to do what stands the facility in the best stead

with regard to possible future litigation. In general, this means healthcare may extend well beyond prudent care, especially with regard to end-stage disease treatment, further increasing suffering and already unsustainable healthcare costs. Trained volunteer guardians may offer an alternative with regard to client advocacy in this decision-making process.

Theory of Volunteerism

In order to appreciate the practical implications of volunteer recruitment and retention, it is necessary to understand why people volunteer. Although, the terms initial motivation to volunteer and motivation to continue to volunteer are not yet well defined in the research, some promising theories and models have emerged to explain motivation to volunteer.

The current state of research knowledge on theories of motivation to volunteer (MTV) dates back to the 1990s. Cnaan and Goldberg-Glen (1991), building upon previous descriptive research on MTV, attempted to construct and empirically test a model of MTV. Their literature review indicated approximately 28 different motivations, each mentioned in at least five previous studies on MTV. Their results indicated a unidimensional model. People tended to volunteer for a combination of reasons unique to each individual resulting in an experience satisfying to them. This blend of motivations appeared to be not entirely altruistic or egoistic, as had been reported in descriptive research indicating a bi-dimensional or two-factor structure found by several researchers (Frisch & Gerrard, 1981; Horton-Smith, 1981; Latting, 1990, all as reported by Cnaan & Goldberg-Glen, 1991). Simultaneously, Morrow-Howell and Mui (1989),

also as noted by Cnaan and Goldberg-Glen, described a three-factor model including social, altruistic, and material motivations.

Cnaan and Goldberg-Glen (1991) also noted an important key to future research related to volunteer specialization: “Another question beyond the scope of this article, is whether some models are applicable only to the specific populations of volunteers” (p. 275). This is an important distinction, as volunteerism implies a wide variety of role definitions ranging from occasional or episodic volunteers, such as holiday soup kitchen volunteers, to roles that are time-limited but time-concentrated, such as a Habitat for Humanity volunteer, and less time-concentrated (compared to Habitat for Humanity) but more highly relational roles as would be assumed by older adults volunteering for Senior Companions or Experience Corps (Morrow-Howell, 2010), as well as volunteer guardians. Therefore, specific motivating factors may apply more aptly to certain volunteer roles than to others. Appreciating these differences informs practical recruitment and retention issues, and may lead to a more targeted and successful approach to each.

The functional framework of volunteer motivation.

Building upon previous research relative to model development of MTV, Clary et al. (1998) examined a more complex, multi-factor model. Using a sample of a variety of volunteers, and later validated with hospice and AIDS volunteer samples, the authors tested a six-factor model and an instrument, the Volunteer Functions Inventory, based upon a functional approach to volunteerism. Functionalism, a well-researched construct in social psychology used to examine individual attitudes and their influences on outcomes and goal-attainment, fits well in terms of explaining how individual volunteers

come to the same volunteer assignment for different reasons but perform the same volunteer tasks. As Clary et al. (1998) note:

The core propositions of a functional analysis of volunteerism are that acts of volunteerism that appear to be quite similar on the surface may reflect markedly different underlying motivational processes and that the functions served by volunteerism manifest themselves in the unfolding dynamics of this form of helpfulness, influencing critical events associated with the initiation and maintenance of voluntary helping behavior. (p. 1517)

The six motivation factors as described by Clary et al. (1998) are as follows: the *values* factor, associated with altruism or humanitarian interests; the *understanding* factor, described by the authors as a motivation to learn new skills and practice existing but unused skills and abilities; the *social* factor, or an expression of a volunteer's motivation to be with friends but also to engage in an activity that one perceives to be important from another's point of view; the *career* factor, a motivation that serves many young volunteers well, that is, volunteering to explore a new life or career course, or to maintain current career expectations; the *protective* factor that may serve to help volunteers deal with their own personal issues and negative affect, and may serve to mitigate volunteers' perceptions of guilt vis-à-vis those 'less fortunate;' and, the *enhancement* factor, which essentially speaks to volunteers' motivation to attain personal growth and improved self-esteem.

Clary et al., (1998) tested the validity of their model using the Volunteer Functions Inventory (VFI), which is comprised of two subscales: 'Reasons for Volunteering', a 30 item questionnaire using a 7-point Likert scale with anchors ranging from *not important or accurate for you* to *extremely important or accurate for you*, and 'Volunteering Outcomes', an additional 17 items designed to examine volunteer satisfaction acknowledging that if one's motivation(s) to volunteer are fulfilled, the

volunteer would be satisfied with the experience (anchors ranging from *strongly disagree* to *strongly agree*). Respondents were asked to rate each item on both subscales. A copy of the Volunteer Functions Inventory is included in Appendix B, and Volunteer Functions Inventory Follow-Up (Outcomes) is included in Appendix C.

Research on hospice volunteers.

The role of volunteer guardian is a high-commitment, high-responsibility volunteer position. There is no research specific to motivation to volunteer as a guardian. Therefore, given the lack of research on volunteer guardians, it is important to look for populations that may be similar, such as the role assumed by hospice volunteers who may also be asked to cope with potentially equally demanding circumstances. Volunteers who undertake high burden volunteer tasks may volunteer for reasons other than, or in addition to, the established motivations previously discussed.

Some research exists with regard to motivation to volunteer for hospice. These studies use a variety of different methods and surveys, making comparisons across studies difficult. Among studies that reported using a qualitative method or survey designed specifically for that study, the following motivations are reported: to contribute/help and to have something to offer (Murrant & Strathdee, 1995); due to personal interest and death of a family member (Scott & Caldwell, 1996); to help persons in need, to help ease pain, and out of civic responsibility (Black & Kovacs, 1996); due to a personal experience with hospice (Black & Kovacs, 1999); and to be of service to others, or due to a personal experience with death, or for work experience/to practice unused skills (Planalp & Trost, 2009a). Responses such as to contribute/help, to help persons in need, and to be of service to others, would seem to indicate hospice volunteers

are motivated by the values factor as defined by Clary et al. (1998), that is to say they choose to volunteer to be of service to others, an altruistic factor.⁴

However, outside the boundaries of the VFI factor model, it appears as though a second factor emerges, a factor specific to a hospice volunteer's motivation. As noted in the findings described above, many hospice volunteers have had a personal experience with death or experience with hospice. Payne (2001) noted in her research with hospice volunteers that they, "reported being strongly motivated to help others (88%) and most had previous bereavements (71%)" (p. 110). Intuitively, this is something most hospice organizations have understood. Therefore, it is anecdotally known that most have adopted a policy against the engagement of newly bereaved family members as hospice volunteers. However, many hospice volunteers are still compelled to volunteer for hospice after a significant bereavement period. Their personal experience may make what to some would be intolerable issues more tolerable.

Planalp and Trost (2009b) tested the validity of the VFI using a hospice volunteer sample. They note "the most systematic and empirically grounded inventory of motivations for volunteering is the work of Clary et al. [1998], and Omoto and Snyder [1995]" (p. 188). However, the results of their research with 351 hospice volunteers (mean age = 55 years) indicated a four-factor model (ranked in order): a combined values/understanding factor, a social factor, a combined protection/enhancement factor, and finally a career factor. Thus, a slightly different factor model may have emerged in this recent research specific to the high-responsibility role of hospice volunteers.

⁴ A construct diagram of this array of factors is available in Appendix D. It illustrates the development of these constructs across the several subsequent research studies noted above.

Claxton-Oldfield et al. (2004) have also developed a measure of motivation to volunteer for hospice, the Inventory of Motivations for Palliative Care Voluntarism (IMPCV). Using qualitative interviews, the authors initially identified 22 different reasons for hospice volunteerism that they later reduced to a four-factor model using the IMPCV. The factors included leisure, personal gain, altruism, and civic responsibility. The IMPCV has yet to be subjected to the same rigorous testing as the VFI. However, factors different from those apparent in the general volunteer population seem to have emerged again among hospice volunteers.

It is also important to note that the characteristics of hospice volunteer samples seem to be different from the general volunteer population. Hospice volunteers tend to be older, married female Caucasians (Finkelstein, 2008a, 2008b; Finkelstein, Penner & Brannick, 2005; Planalp & Trost, 2009; Roessler, Carter, Campbell, & MacLeod, 1999; Scott & Caldwell, 1995). Among these studies that reported mean participant age, the average age of participants across studies was 53 years of age. This may suggest that cumulative life experience may also support the hospice volunteer. It may also suggest an element of peer service evident in the hospice volunteer population. Understanding these motivations and characteristics may be important to recruiting and retaining hospice volunteers.

Relevance to the Social Work Profession

The growing number of older adults requiring social services has been documented earlier in this dissertation. The change in economic circumstances since the financial crisis of 2008 may lead to funding cuts jeopardizing the few programs that support guardianship services for older adults. Social workers are on the frontlines with

regard to provision of services to at-risk older adults. Support from and collaboration with programs that may help fill a service gap could be of great importance with regard to the most efficient use of social work staff time in overwhelmed agencies. Social workers are perhaps the best trained professionals to provide guidance and supervision to volunteer guardians. Social workers may also be in the best position to understand why volunteers provide guardianship services, and to learn about this agency-based practice to better replicate the idea in other communities. Information gleaned from this research may also inform the recruitment and retention strategies of organizations currently engaging or planning to engage volunteer guardians.

There may also be an opportunity to impact public policy regarding guardianship and other issues linked to older adult wellbeing. These may include addressing service disparities at the community level, and the development of other volunteer models designed to support older adult functioning and prevent decline.

The increasing need for services for older adults has encouraged a rapidly growing fee-for-service industry sector to address these needs including geriatric care management services and guardianship services. The costs of these services may not be affordable to the average American older adult, a lamentable disparity in terms of access to service. A public service option, fueled by the volunteer sector, will be increasingly important. Social workers may have a significant role in community-based implementation of volunteer models positioned to provide services to older adults.

Research Questions

A significant amount of research, both qualitative and quantitative, is available that describes why people volunteer. Research on this subject specific to more highly

specialized volunteer roles is in the early stages, but suggests that some groups, such as hospice and AIDS volunteers, may be compelled to volunteer for reasons different from those found in the overall body of volunteer motivation research (Black & Kovacs, 1999; Claxton-Oldfield, & Claxton-Oldfield, 2007; Planalp & Trost, 2009a; Scott & Caldwell, 1996). Therefore, it was thought likely that other groups of volunteers, such as volunteer guardians, may also be different from the general population of volunteers. Employing a validated quantitative survey, such as the VFI (Clary et al, 1998) permitted an exploration of whether the volunteer guardians were motivated to volunteer for reasons different than the larger sample of volunteers.

No research had been found that describes why people would volunteer to provide guardianship services in the community for someone they do not know. Therefore, the purpose of this study was to explore the experience of volunteer guardians, specifically reasons why individuals would volunteer as guardians to people they do not know in the community.

Recruiting and retaining volunteer guardians is crucial. Understanding their experience may help to inform these tasks. Therefore, qualitative interview questions were developed to inform the following research questions:

1. What is the lived experience of volunteer guardians?
2. What brings them to this task (i.e., what are their reasons for volunteering as a guardian)?
3. How do they see their role as volunteer guardians?
4. How has the experience affected them?

Chapter 2: Method

In order to best address the research questions, a mixed methods approach was employed. Simply noted, mixed methods designs "...include at least one quantitative method (designed to collect numbers) and one qualitative method (designed to collect words), where neither type of method is inherently linked to any particular inquiry paradigm" (Greene, Caracelli, & Graham, 1989, p. 256, as cited in Creswell & Plano Clark, 2011). To date no empirical literature has been found descriptive of volunteer guardians, the cohort of study in this research. However, there is an approximately 25 year history of quantitative research on volunteerism, as well as some additional qualitative and mixed methods research that sought to describe specific types of volunteerism, such as hospice volunteerism. This study follows this research tradition, as "a need exists because one data source may be insufficient" (Creswell & Plano Clark, 2011, p. 8) to understand the phenomenon in question. The authors further note that results may also be used to "validate or corroborate quantitative scales" (p. 73). Due to the exploratory nature of this study with regard to volunteer guardians, qualitative data were predominant in this analysis. Quantitative data were analyzed to compare the survey results from this sample of volunteer guardians to the larger sample of traditional volunteers used as a means to validate the Volunteer Functions Inventory (VFI; Clary et al., 1998).

Mixed methods research requires complete transparency with regard to the nature of the design. Creswell and Plano Clark (2011) note the importance of careful explanation of the inherent weight attributed to each section of data. As noted above,

qualitative data were of primary importance in this study, with quantitative data serving as a descriptor of the sample, as well as a link to previously-collected qualitative and quantitative data on volunteerism. Teddlie and Tashakkori (2009) suggest a notation system with regard to describing this design orientation; in the case of this study, the notation was ‘QUAL + quan’ indicating the predominance of the qualitative data in data analysis.

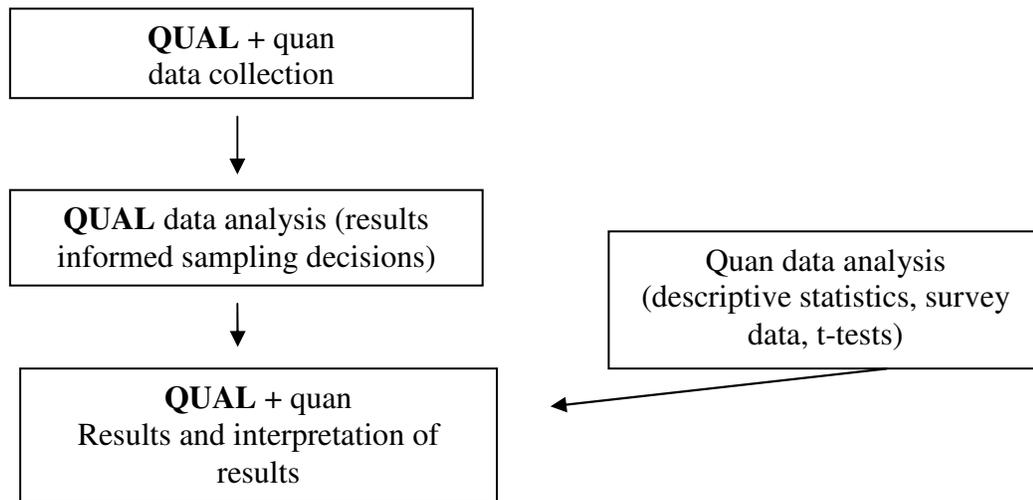


Figure 1. Diagram of study design.

Moreover, this study employed a convergent triangulated design as noted by Creswell and Plano Clark (or a parallel mixed design as per Teddlie and Tashakkori), in that both qualitative and quantitative data were collected simultaneously during the first interview phase, and that the analysis of each type of data informed the analysis of the other type of data. Please refer to Figure 1 for a diagram of the study design.

All study procedures were reviewed and approved by the University of Maryland, Baltimore Institutional Review Board (IRB) as of April 2011. Subsequent changes to methodology, including interview guides, as well as to procedures were also reviewed and approved by the IRB.

Audio recordings for all interviews, as well as transcribed interview data were all secured on a password-protected computer. Printed transcripts, surveys, questionnaires, and the second copy of informed consent documents were all secured in a locked file cabinet. Access was permitted only to the dissertation chair, two second readers, a transcriptionist, and this researcher.

Study Site

The agency, located in a mid-Atlantic state, is a not-for-profit agency supported by The United Way and the County Department of Human Services, as well as by charitable donations from other organizations. It has been in operation for approximately 14 years, and had at the time of this study, 19 active volunteer guardians with current client assignments ('active'), eight guardians described as previous guardians without current client assignments ('inactive'), four volunteers designated as 'past volunteers not currently interested in helping' ('past volunteers'), and two volunteers who wished to be of service but not as guardians ('non-guardian volunteers').

Volunteer guardianship is relatively rare. At the time of this study, there were few comparable models, all of which were associated with a public agency or religiously-affiliated not-for-profit agency. Working with an agency that has a singular mission, without the contravening issues inherent in a public agency, such as an area agency on aging, avoided the potential complications implied in such a model (i.e., paid staff relating poorly to volunteers and thereby influencing the course of volunteerism). Research driven by primary data collection is generally conducted at the pleasure of the agency or respondents in question and requires "buy in" from staff and guardians (Maxwell, 2005). It was necessary to secure access by communicating by email and

telephone with the agency executive director, providing her with a proposal for this research, meeting in person with the executive director and the agency founder, and maintaining contact with agency staff. The executive director with whom initial contact was made ultimately resigned her position. Thus, the “buy in” process began anew with her successor.

It is important to note that little was known by the researcher about this agency at the time the research was conducted (other than information available on the organization’s website or gleaned in initial conversations with staff and administration). This was an intentional choice made by the researcher, who chose to see the agency operation through the ‘eyes’ of the volunteer guardians. The research design also permitted interviews with agency staff and administration. Ultimately, six such qualitative interviews were conducted; three with administration and three with staff. These data were analyzed and will be reported in Chapter 3 of this dissertation.

Sample Recruitment

Generally, decision making regarding sample selection in qualitative research requires a strategy of purposeful selection (Maxwell, 2005). Broad decisions may be made in advance of beginning the interview process, but latitude is permitted with regard to choosing respondents as the research develops. These choices, made based on analysis of data, must reflect an interest in securing information from those who can best address the research questions of the study including those with information that could potentially prove discordant with analysis so far. This study used such a strategy. Little was known about the prospective respondent pool available from the agency mailing list prior to initiating this study. However, a strategy was developed to conduct an initial set of two

to three interviews with different respondents, code and analyze data, make decisions regarding changes required to the interview guide, and make choices regarding whom to interview next. Therefore, interviews were conducted, data were analyzed, and sampling decisions were made after each set of two to three interviews.

The agency mailing list was divided into four categories: (a) active volunteers, (b) inactive volunteers, (c) past volunteers not interested in volunteering, and (d) non-guardian volunteers. Each volunteer had corresponding information including a street address, phone number, and email address. It was possible in many cases to glean the gender of the participant, and in two cases, a professional status was indicated. It was not possible to make sampling decisions based on unavailable information, such as age, employment type, or socioeconomic status.

All 33 potential participants received a letter of invitation describing the contact procedure including the phone number and email address of the researcher, as well as an 'opt out' postcard to be mailed should the respondent choose not to participate. Over a two week period following the mailing, the researcher received six 'opt out' postcards, and two phone calls to initiate the research process. Those two participants, both women and both active guardians, were interviewed first, and analysis of these data drove decisions about whom to interview next. By category, table 1 below describes available information regarding sample recruitment.

At the data collection level, the researcher strove to use purposive sampling to permit the possibility of achieving maximum variation sampling (Guba & Lincoln, 1989, as cited by Maxwell, 2005), that is to say the inclusion of as many possible participants of different demographic characteristics and potential points of view, including outliers or

negative cases, as could be ascertained using information from the agency mailing list. This technique provided the fullest exploration of research questions, themes, and codes as it encouraged heterogeneity of responses. Thus, decisions were made as interviews progressed with regard to including members of all four categories of volunteerism at this agency, men and women, and those with professional status designation. Additionally, three participants were interviewed a second time to explore themes more fully, and to provide an opportunity for member checking, a technique expected in qualitative studies to garner consensus (or dissent) from participants regarding researchers' interpretations of the interview data (Padgett, 2008, Teddlie & Tashakkori, 2009). Second interviews also allowed for the possibility of reduced respondent reactivity to the presence of the researcher. The Volunteer Guardian Second Interview Guide is available in Appendix G.

Therefore, of the original 33 potential participants on the mailing list, six respondents returned opt out postcards (18% opt out rate). Of the remaining 27 potential respondents, six respondents did not return a phone message (22% passive refusal), and two refused when contacted by phone (7% active refusal). Ultimately, of the 19 remaining potential participants, 12 participants were interviewed; a sample cohort of 9 women and 3 men. Two invited participants, both women who were active guardians, contacted the researcher to initiate the interview process. Therefore, in order to include adequate representation by gender, a subsequent round of phone contacts were made to men on the mailing list in both the active and inactive guardian categories. Thus, the next two respondents were men, one an inactive guardian, one an active guardian. In an attempt to interview a volunteer in the remaining categories (past volunteers and non-

guardian volunteers), potential respondents in each of the two categories were contacted next. One potential respondent returned the phone call. The others did not.

Table 1

Sampling Procedure for Study

Category 1: Active Guardians (19 on list; 5 opted out, leaving 14 available)							
		Women	Men	# con- tacted	# no response	final # available	# inter- viewed (% of total)
# available to interview	14	11	4	11	2	9	9 (64%)
Category 2: Previous Guardians (8 on list; 0 opted out, leaving 8 available)							
		Women	Men	# con- tacted	# no response	final # available	# inter- viewed (% of total)
# available to interview	8	4	4	5	3	2	2 (25%)
Category 3: Past volunteers not interested in volunteering (4 on list; 1 opted out, 3 available)							
		Women	Men	# con- tacted	# no response	final # available	# inter- viewed (% of total)
# available to interview	3	3	0	2	1	1	1 (33%)
Category 4: Non-guardian volunteers (2 on list; 0 opted out, 2 available)							
		Women	Men	# con- tacted	# no response	final # available	# inter- viewed (% of total)
# available to interview	2	2	0	2	2	0	0 (0%)
Total	27	20	7	20	8	12	12

Additional Data Regarding Key Stakeholder Recruitment

Administrative staff and board members were invited to participate in the interview process only after the conclusion of the 12th guardian interview. The purpose of these interviews was to expand upon, provide clarification of, and add context to data provided by the volunteer guardians. Thus, key stakeholder interview guides (board members and agency staff) were developed based on analysis of the qualitative data available from the first round of guardian interviews (Appendix E and F). Seven board and administrative personnel were contacted. Six agreed to an interview. Two current board members and one current staff member were interviewed. One previous board member and two previous agency staff members were interviewed. The purpose of the interviews was to further explore issues raised by the guardians during their interview process and to provide additional trustworthiness to the research findings.

Procedure

After conducting each set of two to three interviews, upon review and consultation with dissertation committee members, no substantive changes were made to the interview guide (Appendix A). As noted previously, outreach proceeded in terms of selecting new respondents by gender. (However, there were significantly more women than men available to interview.) Moreover, two potential participants with a professional designation were contacted, and both agreed to participate. Ultimately, qualitative data were available to analyze from 12 volunteer guardians participants. However, one respondent had been categorized incorrectly by the agency on their mailing list. As she identified as a new, untrained volunteer, she was unable to respond to most

interview guide questions. Demographic and survey data were available from all 12 interviewees.

Initial interviews and interview guide.

Each participant who agreed to an interview chose their interview location to protect privacy. Each was asked to agree to and consented to audio taping. Prior to beginning the interview, each participant was given time to review the informed consent document with the researcher (see Appendix H). After signature, a copy of this document remained with the participant. The purpose of the study was reviewed with the respondent, and a series of questions were posed from the interview guide (see Appendix A). The first interview guide for the volunteer guardian interviews was developed in consultation with the dissertation committee. The first question, 'Please tell me about your experience as a volunteer guardian,' permitted respondents latitude to answer in a manner meaningful to them. Follow-up questions and probes involved asking about how and why they chose this interview task, solicited information about difficult and satisfying experiences, and asked about training and support needs. Following the interview, each volunteer guardian participant completed the Volunteer Functions Inventory (Clary et al., 1998; Appendix B) and a demographic questionnaire (Appendix D). The survey measure and the demographic questionnaire were completed by the participants following the qualitative interview so as to avoid priming participants. Each respondent was asked if they would object to a second interview; none objected. First interviews occurred between June and August 2011. The interviews lasted approximately 45 to 75 minutes each. Participants received a follow-up thank you note or email. (Method of contact preferred was requested at time of interview.)

Second interviews and interview guide.

Three second interviews were conducted in February and March 2012. Each of the three guardians was contacted by phone or email, and with their assent, the second interviews were conducted by phone. These three guardians were chosen for second interviews in order to gain clarification or elaboration on an issue raised in their first interviews. Each participant was reminded of the purpose of the interview, and that the previously-signed informed consent document remained in effect. The volunteer guardian second interview guide was developed with members of the dissertation committee to follow-up upon or clarify specific issues raised in the first interviews and to provide member-checking. Some of these issues included elaboration on operational style as a volunteer guardian, elaboration relative to perception of advocating for their larger community, and recruitment. The Volunteer Guardian Second Interview Guide is available in Appendix G. There were no quantitative data collected.

Key stakeholder interviews and interview guides.

Four of six key stakeholder interviews were conducted in person. With consent from the participants, two staff interviews were conducted by phone. In each case, informed consent was obtained; in person with the face-to-face interviewees, and following the inclusion of the documents as an email attachment to be reviewed prior to the interview for those who chose to be interviewed by phone. Acknowledgement of receipt of the document and acceptance of the terms was audio taped at the beginning of the telephone interviews with the two agency staff members. Each was also asked for permission to audio-tape the interview, a requirement stipulated by the State of Maryland. This acknowledgement was also audio-taped. The key stakeholder interview guides were

developed to follow-up on information from the volunteer guardian interviews; specifically, regarding recruitment with the board members (Appendix E) and regarding retention issues, such as training and support, with the staff members (Appendix F). There were no quantitative data collected during these interviews.

Measures

In addition to the qualitative interviews, the use of a well-validated instrument was employed to permit the further development of established constructs in research on volunteerism, as well as the possible addition of new constructs germane to the subpopulation of interest in this study, volunteer guardians. Demographic data were also collected.

The Volunteer Functions Inventory.

The participants completed the Volunteer Functions Inventory (VFI; Clary et al., 1998; Appendix B), a 30-item questionnaire shown to be reliable in ascertaining motivation to volunteer among volunteers who engage in a wide array of volunteer roles. The VFI was scored using a 7-point Likert scale with anchors ranging from 1 (*not at all important/accurate for you*) to 7 (*extremely important, accurate for you*). Psychometric properties of the measure were reported in Chapter 1 of this document. Briefly, the VFI measures six factors descriptive of reasons why people volunteer. These factors include Values, Understanding, Social, Enhancement, Protective, and Career. Clary and colleagues (1998) reported Cronbach's alpha coefficients ranging from .89 for Career, .84 for Enhancement, .83 for Social, .81 for Understanding, .81 for Protective, and .80 for Values factor. As noted in Chapter 1, the VFI has been validated with specific subpopulations of volunteers, such as hospice and AIDS volunteers, and in most cases the

results have demonstrated a different factor model than had been initially established by Clary et al. (Black & Kovacs, 1999; Omoto & Snyder, 1995; Planalp & Trost, 2009a; 2009b). As these newer factor models specific to certain types of volunteerism may help to inform recruitment and retention, it was hypothesized that validation of the VFI with the subjects of this study, volunteer guardians, may serve the same purpose. Appendix D includes a construct diagram of the above-described array of factors. Beginning with the original six VFI factors, new factors gleaned from findings of hospice volunteer research are added to the diagram and correlated to the VFI factors where possible.

Demographic questionnaire.

Each participant was asked to complete a brief demographic questionnaire including gender, year of birth, marital status, employment status, employment category (career), current volunteer status, formal volunteer history, and history as a caregiver for family or friends (informal care giving). These data were requested to better describe each participant. The demographic questionnaire may be found in Appendix I.

Data Analysis

Data analysis process.

The quantitative results were used to frame the qualitative results; to help us to understand better if and if so, how and why, volunteer guardians are different from the referent groups of the volunteer population used to validate the VFI. To this end, data were collected concurrently, as results from both the qualitative interviews and the surveys measures from the same participants necessitated concurrent data collection. It is important to note, however, that quantitative data analysis occurred after qualitative

coding and analysis were complete, so as to avoid a potential researcher bias. Please refer to Figure 2 for a diagram of the process of integration employed in this study.

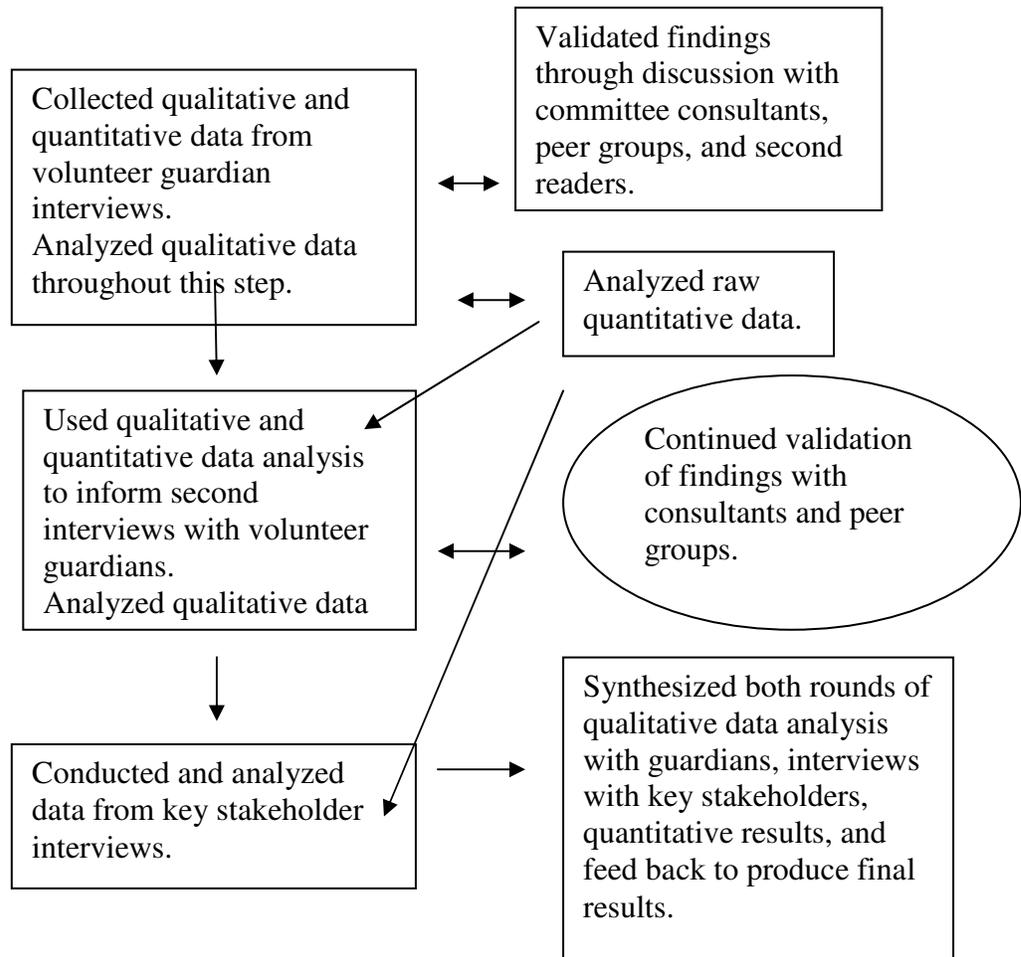


Figure 2. Process of Data Integration (QUAL/quant)

Qualitative data analysis.

The Generic Inductive Qualitative Model (GIQM: Hood, 2007) was employed to analyze the qualitative data for this study. GIQM was used due to the constraints of the sample size, which would have impeded the ability to use a full array of grounded theory techniques. GIQM suggests the development of categorical saturation, but not

necessarily the development of theory, by employing two key elements of grounded theory: constant comparison and thematic saturation. Each set of three interviews was transcribed and analyzed prior to embarking on the next set of interviews. This strategy allowed for the possibility of developing a sampling strategy, at least to the extent permitted by the sample information available, a technique noted as acceptable when a larger sample set is not available, a ‘limited grounded theory’ study (Oktay, 2012).

This process also informed the coding analysis of the data. Audio tapes were transcribed (interview one through eight by the researcher) into a paper document. Each interview was analyzed using a handwritten, line by line open coding strategy (Corbin & Strauss, 2008). Thus, constant comparison began immediately. Themes or ‘core categories’ were apparent in the first three interviews and informed the development of analysis going forward (Oktay, 2012). Memos and field notes were included in this analysis to support the trustworthiness of the analysis (Padgett, 2008).

Many of these initial codes were derived from responses to the interview guide questions, all of which were informed by the research questions for this study. However, some a priori coding conceptualization was possible, especially relative to why the guardians began, and why they continued to volunteer. This type of coding strategy is well supported in the literature (Creswell & Plano Clark, 2011; Saldana, 2009). The entire codebook for this study is included in Appendix J. Updates and coding changes are noted in this codebook as evidence of the development of coding conceptualization across the analysis of these data.

All 12 interview documents were then uploaded into qualitative analysis software (Atlas ti.version 6.1.9; © 1993-2010 by ATLAS. Ti GmbH, Berlin), and the process of

comparative analysis began anew. Informed by the open coding that developed across the data, this analytical cycle permitted the development of overarching themes incorporating many of the codes into themes reflective of the interview guide (e.g., why the guardians chose this volunteer opportunity and why they continue), as well as the development of a new theme (i.e., how the guardians perform this task). Therefore, categorical saturation occurred to the extent that a higher order data synthesis was possible. This new theme was thoroughly explored across the interview data, and in consultation with others, was viewed in relation to the demographic data collected from the guardians. Thus, a continuum of volunteer guardians developed with associated codes. These results are reported fully in Chapter 3.

Regarding data derived from the key stakeholder interviews, data gleaned from these interviews were not meant to serve as primary data in this study. Therefore, the interviews were conducted, transcribed, and analyzed as a whole, and used to supplement the primary qualitative data collected, the interviews with the volunteer guardians. Results of the analysis of volunteer guardian and key stakeholder qualitative data may be found in Chapter 3.

Ensuring trustworthiness.

Ultimately, trustworthiness guards against potential biases on the part of researcher and participant (Padgett, 2008). Establishing trustworthiness or credibility of interpretations and analysis in qualitative research requires a clearly established and closely followed process of documentation and consultation across a wide array of potential issues and obstacles. Indeed, transparency is noted as perhaps the most important overall quality that adds to the credibility of the research (Bryman, 2006).

At the analysis level, a variety of techniques were employed to ensure trustworthiness. First, the researcher, who transcribed the majority of the interviews, began data analysis at that level, open coded all data, and developed hierarchical coding in qualitative software. Field notes and interview memos were also included in this process. The close exposure to the data at all points in the process allowed for consideration regarding the thickest descriptions possible. Thick description is important with regard to providing “a sufficient base to permit a person contemplating application in another receiving setting to make the needed comparisons of similarity” (Lincoln & Guba, 1985 as cited in Teddlie & Taskakori, 2009, p. 213). Thus, a path was provided to allow for replication or elaboration of this study, that is to say an audit trail, and permitted triangulation of data as well (Padgett, 2008)

Second, a code book was developed. This codebook evolved as the research progressed. Substantive changes in coding titles, the addition of new codes, and the merging of codes can be seen in the codebook, which is attached in Appendix J. The code book also became part of the audit trail for this research. Substantive changes were also noted in the research journal described below.

Third, at each step in this process the researcher maintained a research journal, a combination of reflexive material related to the interview and interpretative process, and day-to-day decision making with regard to sampling, the interviewing process, and data analysis. The researcher also used the journal as an opportunity to note events important to data collection and analysis, such as meetings with consultants, peer group members, and second readers. This journal became an important piece of the audit trail for this research, and will aid in continuing with this research in the future.

Fourth, the researcher met with consultants, such as the dissertation committee chair, committee methodologist, and committee content expert as often as needed as peer debriefing. In addition, two second readers were engaged who read each of the 12 interviews, and either hand coded the documents (reader one) or coded documents in Word (reader two). The researcher met with the second coders to discuss coding strategies, one who is an established qualitative researcher, and the second, a Master's student with little experience in qualitative coding. This permitted the inclusion of a naive perspective helpful to the interpretative process.

Fifth, the researcher met monthly with a peer group of qualitative researchers to review progress, describe results, and process analysis also to engage in peer debriefing. The researcher had the opportunity to make two full presentations of the data and analysis of this research, as well as the monthly opportunity to receive extemporaneous feedback and support.

Finally, the researcher audited a doctoral level course in advanced qualitative methods. This offered the opportunity to consider different interpretations of the data, data analysis, and data presentation.

Quantitative data analysis.

Quantitative data in the form of individual survey scores for the VFI , as well as demographic data, were entered into SPSS Version 17 (2008). Psychometric information on the VFI includes means and standard deviation values for each of the six factors (Clary et al., 1998). The means for each factor from the Clary sample were compared to the means of each factor for the volunteer guardians using one-sample t-tests. Violations

of assumptions of normalcy of data were tested using Kolmogorov-Smirnov Z tests. The results of the quantitative data analysis may be found in Chapter 3.

Chapter 3: Findings

This chapter contains three sections in the form of articles. Article 1 reports on the results of the qualitative data gathered from the first and second interviews with the volunteer guardians. This article allowed for a full discussion of how the volunteer guardians performed this task with specific implications regarding their professional training. Article 2 reports upon the quantitative data, specifically regarding motivation to volunteer, and the qualitative data from the volunteer guardians as to why they chose this task and why they continue to volunteer as guardians. In article 3, the qualitative data from the volunteer guardians, specifically related to recruitment, training, and support is examined vis-à-vis key stakeholder qualitative data gleaned from the same questions.

The findings of this dissertation are presented in the form of three articles. Therefore, the structure is somewhat different from a traditional dissertation. Each article will provide a brief introduction, method specific to that article, findings related to the research questions (or aim) of that article, and the discussion of those findings. Separate reference sections are not provided for each article in order to keep the focus of this chapter on the findings of the study. References are provided at the end of the dissertation. In addition, readers will notice some overlap between the information presented in the introductions and method sections of these articles and that presented in the first two chapters of this dissertation. Chapter 4 will provide an integration of the findings across the three articles.

Article 1: Qualitative Findings (Volunteer Guardians)

How we care for them: What the volunteer guardians tell us about the task.

Many older adults become increasingly incapable of managing their affairs as they age. More are living alone, eliminating the possibility of caregiver oversight (Federal Interagency Forum on Aging, 2008; Pavlov & Lachs, 1998), may live at a distance from relatives who could help, or relatives themselves may be aged with little or no capacity to help. Research has indicated advancing age, poverty, lower education, and living without a spouse are risk factors for self-neglect (Pavlov & Lachs, 1998), which is predictive of those older adults who may potentially require guardianship services (Reynolds, 2001). In a recent study evaluating use of adult protective services (APS), 74 of 211 cases involving older adults were investigated and referred to the legal system to initiate guardianship action. Reasons noted included neglect, exploitation, and abuse; 60% of those referred to APS were living alone; 70 of the 74 individuals were newly diagnosed with dementia (Heath, Kobylarz, Brown, & Castano, 2005). Based on these findings, this article focuses on an innovative service, volunteers who serve as legal guardians to older and disabled adults in their community.

Memory impaired older adults may neglect their own nutrition and self-care, exacerbating health issues, endangering their own health, and driving up healthcare costs (Naik, Teal, Pavlik, Dyer, & McCullough, 2008; Tierney et al., 2004). Dementia is associated with increased hospitalizations secondary to falls, poor nutritional status, and behavioral problems (Nourhashemi et al., 2001). Medications may be misused creating potentially life-threatening medical consequences (Pavlov & Lachs, 1998) and increased hospital admissions (Rogers et al., 2009). In addition, the incidence of alcohol and drug

abuse is rising among older adults (Choi & Mayer, 2000; Just, 2006); substance abuse may further impair cognitive skills and increase risk.

Older adults may overuse hospital services to treat medical issues arising from self-neglect. Hospitals and taxpayers are not only burdened by increased healthcare costs, but hospitals bear the additional burden of securing supportive discharge plans for older and disabled adults who may not be able to follow through with discharge planning. Hospitals are legally mandated to ensure safe discharge. Unsupported older adults may exist as ‘permanent patients.’ These patients may be well enough to leave inpatient hospital level of care. However, they may be unable to cooperate with discharge planning due to cognitive impairment. In many cases, these patients may have little or no insurance and/or illegal immigration status (Roberts, 2012). It has been estimated that the cost to house a permanent patient may exceed \$100,000 per year (NCPA, 2012). Permanent patients, whose care may cost considerably less at a lower level of care or with support in the community, also lose personal freedom and autonomy. Volunteer guardians, such as those in the current study, may provide the support needed for an older or disabled adult to be safely discharged from hospital care.

Task of the Guardian

People who assume legal guardianship accept responsibility for the welfare of another. The judicial system evaluates how guardianship tasks are assigned. Guardianship of the person limits tasks to those involving medical care and, to a certain extent, living circumstances. Guardianship of the estate involves decisional tasks related to the individual’s financial circumstances. Often, plenary guardianship – of both the

person and the estate – is granted. Generally, plenary guardianship is required when an individual has advanced incapacity, such as dementia (Karp & Wood, 2007).

A volunteer assuming this responsibility for a stranger may have little or no information about the person's past, and little sense of how that person would like to live currently or in the future. There may be no supporting documents, such as advance directives, wills, financial records, or significant others to consult. Known relatives may not wish to be or may be incapable of being involved. Some relatives may have conflicted histories with the individuals in need of guardianship (Karp & Wood, 2010; Teaster et al., 2005). Generally, individuals require guardianship because immediate decisions need to be made, for example, a dangerous circumstance may have arisen, but the individual is unable to act on his or her own behalf in a meaningful way. Each individual's case circumstances are different and generally in extremis. Many may be unable to be discharged from a hospital or treatment facility. Some have been abused by friends or neighbors in the community (Rosenberg, 2009). As noted by Heath and colleagues (2005), in 1996 approximately 550,000 older adults were found to have experienced some form of abuse. However, only 21% of these cases were reported to adult protective services. Significant financial abuse is not uncommon. Most individuals' circumstances have come to the attention of county officials, usually through aging services adult protective services divisions (Heath et al., 2005).

Guardianship decisions generally involve three domains. The first domain, healthcare and quality of life issues, may involve treatment decisions; hospital discharge decisions; living circumstances; need for support in the home or placement; collaboration with involved 'others' including relatives; friends, and treatment staff, etc. The second

domain, financial issues, may include an accounting of available financial resources, ongoing monitoring of financial resources, the need to sell property/belongings, and securing appropriate referrals related to finances (e.g., Medicaid, Medicare secondary coverage, county funding, community funding for incidentals). Finally, legal issues, such as records searches, yearly guardianship accounting, as well as a responsibility to report to the probate court system regarding changes and need for continued guardianship may be present (Karp & Wood, 2008).

Therefore, volunteer guardians face a myriad of issues and decisions that generally need to be assessed and acted upon quickly. This may occur with little knowledge of the individual they are responsible for assisting. In the case of volunteer guardians, the volunteers may have little or no experience assisting individuals under these circumstances.

Research on Volunteerism

Research on volunteerism spans approximately 25 years (Wilson, 2012). Volunteerism has been categorized as formal and informal (e.g., family caregiving), and has been defined to include monetary contributions to charities. Additionally, as noted by Morrow-Howell (2010), a definition of volunteerism should include dimensions related to the intensity and duration of the task, the type of agency sponsor, the type of task, and the support from and interaction with the agency. Therefore, a wide range of volunteer tasks have been accounted for in the literature. For the purpose of this research, volunteerism has been defined as a task that one pursues of his or her own volition that is unpaid, coordinated by an organization, and addresses a problem of concern to society (Cnaan, Handy, & Wadsworth, 1996). However, the intense nature of the task and the

volunteers' commitment may make volunteer guardianship unlike most other volunteer opportunities.

A limited amount of research is available, which describes motivational factors for specific volunteer tasks. Mixed methods research using AIDS volunteers conducted by Omoto and Snyder (1995), and based upon research conducted by Clary et al., (1991; 1996;1998) cited throughout this dissertation, which indicated six seminal factors for volunteering, determined that AIDS volunteers may have different motivations than the general population of volunteers. These motivations included a new construct titled 'community concern' with themes reflective of "a sense of obligation to the gay community," and "because of my concern and worry about the gay community" (p. 675). Reasons for volunteering at a specialized task are also evident in qualitative and quantitative studies with hospice volunteers. Planalp and Trost (2009) tested the validity of the six-factor model with hospice volunteers. Results indicated a four-factor model. Black and Kovacs (1996) noted a sense of civic responsibility among other different factors specific to hospice volunteers (i.e., a personal history with hospice). Affinity, identification with and empathy for suffering others, emerges in the work of Claxton-Oldfield (2007), Crook, Weir, Willms, and Edgorf (2006), and Dien and Abbas (2005). All three studies found common themes related to altruism (values factor) found in the original motivation to volunteer research (Clary et al., 1998), but with distinctions specific to these more intense volunteer experiences. Although no research specific to volunteer guardians was found, it may be true that volunteer guardians choose and continue in this specialized task for reasons unique to this task, as has been found with other specialized volunteer tasks. Therefore, the purpose of this article is to explore the

experiential perceptions of volunteer guardians in order to better understand who they are and how engage in this complex volunteer activity.

Method

Study Site

The sample for this study included 12 volunteer guardians from a not-for-profit, freestanding volunteer guardian agency in a mid-Atlantic state that has been providing volunteer guardian services to its local community for more than 14 years. The Agency granted access to their entire mailing list, which included 19 guardians with current assignments ('active'), 8 'previous' guardians without current assignments ('inactive'), 4 designated as 'past volunteers not currently interested in helping,' and 2 volunteers who wished to be of service but not as guardians. The mailing list included names, addresses, phone numbers, and email addresses for the volunteers, as well as the aforementioned volunteer status information. Therefore, sampling was purposive but based upon the limitations of the information available (Maxwell, 2005). Although efforts were made to adequately sample both active and inactive volunteer guardians, both males and females, due to the small available sample, all who were contacted and accepted the invitation to participate were interviewed. Demographic data were collected at the time of the interviews to better describe the characteristics of those interviews. The Agency does not keep this information, so a comparison to the larger population of Agency volunteers could not be made.

Participants

Participants were chosen from the agency mailing list, which contained four categories of volunteer guardians: active guardians, inactive guardians, past volunteers,

and non-guardian volunteers. Table 1 provides information regarding the sampling process and may be found on page 31 of this document.

The final sample included nine women and three men with a mean age of 53.8 years. All had prior volunteer experience. Table 2 provides descriptive statistics for the sample.

Table 2

Descriptive Characteristics of the Sample (N = 12)

Characteristic	Frequency	Percentage
Gender		
Male	3	25
Female	9	75
Age		
30-39	1	8
40-49	3	25
50-59	3	25
60-69	4	33
70-79	1	8
Volunteer Status		
Active	9	75
Inactive	3	25
Employment Status		
Employed full-time	6	50
Employed part-time	3	25
Self-employed	1	8
Retired	2	16
Employment Category		
Human Services Professional ^a	5	42
Non-Human Service Professional	7	58
Prior Volunteer Experience	12	100

^aHuman service professional is defined as engagement in a job with a not-for-profit organization including social service administration, disabilities administration, clergy, and social work direct practice.

Procedures

All procedures were approved by the University of Maryland, Baltimore Institutional Review Board. Outreach was made via initial letter of explanation and invitation that included an 'opt out' post card followed by a telephone call from the researcher to those who did not opt out. Six volunteers (five active, one inactive) declined to participate. One active volunteer and three inactive volunteers did not respond to the follow-up phone call. Each of the 12 initial interviews was conducted at a private location chosen by the participant. Informed consent was reviewed and agreed upon. Each interview was conducted and audio recorded by the researcher, and lasted approximately 45 minutes to 85 minutes. Three second interviews were solicited to ask pertinent follow-up questions and to 'member check,' a critical component of trustworthiness in qualitative research (Padgett, 2008). These second interviews were conducted by telephone and audio recorded. All interviews were conducted between June 2011 and March 2012.

Interview Guide

This study employed a semi-structured interview guide. In general, participants answered fully in response to the first question, 'Tell me about your experience as a volunteer guardian.' Probes inquiring as to difficult and satisfying situations they may have faced, as well as why they sought this specific volunteer task, what helps to support them in this task, and how the experience has affected them helped to further develop responses.

Data Analysis

Interview data were analyzed using the Generic Inductive Qualitative Model (GIQM; Hood, 2007); a qualitative technique well suited to descriptive research

questions in pilot and nascent research situations with smaller samples. Considered a precursor to grounded theory, GIQM does not require the development of theory, but has as its goal a deep, interpretive analysis of themes arising from the interview data. Maxwell (2005) describes this as an analytic style that combines process research questions with review of data throughout the collection timeline to inform emergent theme saturation and possible theory development. Therefore, this analytical process does require important elements of grounded theory, including constant comparison and theoretical saturation (Oktay, 2012). Data were analyzed following each set of two to three interviews. This process permitted constant comparison, open coding and the development of a hierarchical coding structure to begin early in the procedure that also helped to inform choices about whom to interview next. Although the agency mailing list was somewhat limited, all efforts to include participants in all four categories of volunteer status, as well as men and women, and those with a professional status designation were made throughout data collection. This helped to ensure sampling representative of all the guardians on the mailing list (Creswell & Plano Clark, 2011; Miles & Huberman, 1994; Padgett, 2008).

Findings

The interviews began with a ‘grand tour’ question (Fetterman, 2010): “Would you tell me about your experiences as a volunteer guardian?” Each of the participants initially responded in a similar fashion; they related the story of their first client, how they came to work with that client (ward), what the initial case circumstances were, etc. Thus, while probing participants with regard to why they chose this particular volunteer experience, the guardians actually reported a great deal of information about what they

did, that is to say, how they worked through the issues and problems of their cases. Thus, themes emerged related to how the guardians performed their task, including specific information regarding how they managed conflict and solved problems ('how we deal with conflict and solving problems'), whether the guardians needed to establish a personal relationship with their client or others working with them ('need for affiliation'), how they sought help, and the type of training they desired ('asking for help and seeking training').

How We Do This

During the interview process, participants offered information that described how they solved problems for their clients. Across each of the themes discussed below, a range of responses seemed to be established. It was not possible to establish conditions for the ranges established as client cases seemed so multi-faceted and unique. It seemed that the condition most predictive of 'how we do this' was related to the guardians' experience and professional background, and their personal style.

Some of the respondents described how they approached the task of volunteer guardian, which seemed to be associated with their personal style (i.e., characteristic of their personality). For example, responses ranged from volunteers who were comfortable taking a volunteer assignment with little or no information to those who sought to understand much more specifically the details of the situation their clients were facing.

I tend as a personality to leap before I look, because I find that life is much more interesting that way. So, I was more than willing to take on the challenge without really knowing what I was going to get into. (3)

...I think that is very important - to know exactly what you are getting into, because wards are all over the spectrum. (1)

Ultimately, all of the participants offered a great deal of unsolicited information in service of responding to the interview questions about why they serve as volunteer guardians. Essentially, participants would begin almost immediately to talk about their wards, the problems the guardians and the wards faced, and how they solved these problems. New themes emerged descriptive of an operational style. These themes – dealing with conflict, problem solving, affiliation, asking for help/seeking training – were quite well developed across the interviews. When viewed vis-à-vis the demographic information collected, most specifically the professional status of the participants (human service versus non-human service professionals), a clear picture began to emerge descriptive of a continuum of volunteer guardians.

Themes related to ‘how we do this,’ such as ‘how we deal with conflict/solving problems’ (active to passive styles), ‘seeking support/training’, and ‘need for affiliation with client/other,’ each contained data descriptive of properties and dimensions, which could be roughly correlated to the demographic characteristic ‘job type.’ For example, human service professionals included social workers, clergy, and social service administrators and tended more toward active case management styles. Other volunteer guardians worked in business, accounting, and consultant positions. Those without human service training tended to act more as functionary guardians. Figure 3 depicts a representation of this finding.

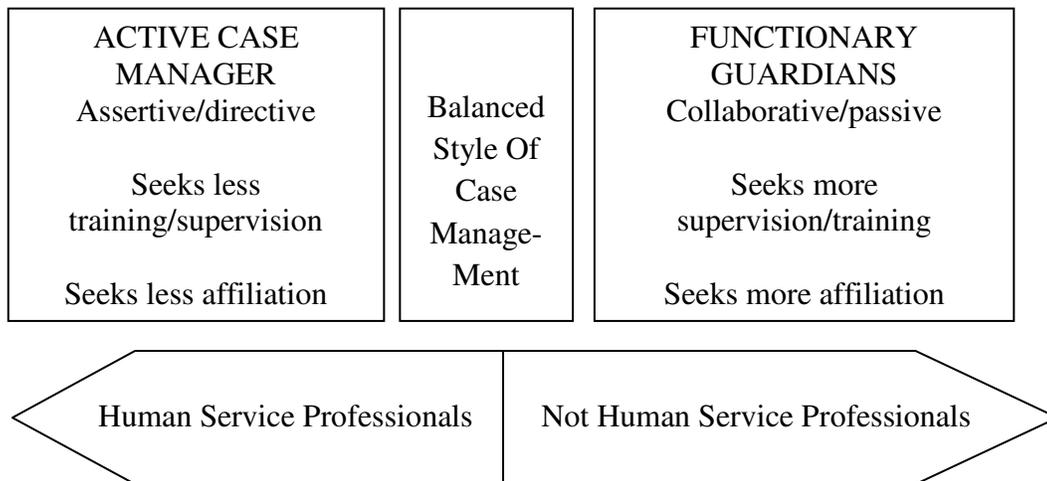


Figure 3. Continuum of Volunteer Guardian Operational Style.

How We Do This: How We Deal With Conflict and Solve Problems

“The interrelationships here are reality show type stuff” (5).

Participants offered information regarding their strategies for dealing with conflicts they faced with their wards. These data tended to explain how they approached problem-solving and conflict inherent in some, but not all, cases. When guardianship is required, it is generally because there are a significant set of issues to address on behalf of a client. These issues may include: the need for an immediate discharge plan or admittance to long-term care, family or neighbor conflicts at times rooted in abuse and neglect, property sales, tax problems, as well as working with staff in institutions who may not be accustomed to working with a perceived outsider.

In general, these data seemed to support a range of problem-solving and conflict

resolution styles; some guardians tended to seek instruction and guidance from those associated with the case. Others seemed to be more inclined to 'take charge,' providing guidance to those associated with the case. This range seemed associated with professional background.

Dealing with some of these issues in a more assertive way seemed to be characteristic of people with human services training. For example, initially a human service professional working as a guardian attempted to coalesce the family: "When this came up, you know, I could've made the decision unilaterally. I just didn't want to. I wanted the family to be part" (3). He soon found he needed to make decisions on behalf of his ward without input.

So, and then I called the relatives, and said I'm selling the home. There will be a little bit of income. What do you want me to do? And, I got no response. So, I said, you know, this is ridiculous. I'm just gonna do it. So, I sold the home, and I put the money back in his account. (3)

Decisions such as these may follow on the heels of frustration with little or no cooperation, but seem more typical of an assertive approach characteristic of those with human service training.

...And I said, now, let me say this – I will make a decision. None of you may like it. But I will make it with him in mind. And if you don't like it, I don't care. (5)

But I'm someone who holds my ground very clear on what I want and what I don't want. So they were talking about some nursing home in almost upstate New York or something. And so I had to deal with them and say, not happening! Let's be real clear on it! [*emphatically*]...and I made it very clear you have to let me know. So, they call me on my cell number. They call me on vacation. They call me morning, noon, and night. Fortunately, the last couple of years, it's been very minimal...Fortunately, I'm someone who takes control, and so I just moved forward. (7)

I think that's because of the work history. Cause you know like I have no problem going in the hospitals, I have no problems making decisions, I have no

problem talking to doctors because of the experience, you know. If maybe, again, if I had worked someplace else I might, but.... (12)

Those who are not human service professionals tended toward a less assertive, more collaborative approach, nevertheless reporting they often accomplished the goals. Some of the guardians seem to move toward being more directive as they gained experience. A volunteer without human service training was initially so reticent about becoming a guardian, she worked as a volunteer in the Agency office to gain experience. Upon taking her first case, she reported feeling overwhelmed initially by the staffing issues at the institution where her ward lived. However, she was supported by the agency to be assertive on behalf of her ward:

You know, like I said, ordinarily they wouldn't have called me about this feeding tube issue. They would have just side stepped me. (6)

Another guardian without human service training requested advice from the agency on how to work with potentially contentious family members: "I immediately wrote to both sons and told them what a privilege I thought it was to assist their mom, and if they'd like to meet, I'd be happy to." Over time, she was counseled "...not to ask the sons. That was a pretty unusual situation where there were adult children, not to ask their opinion; to tell them what my decision was, and because, if their opinion differed from mine, then it would put us into an adversarial role" (1).

However, more importantly, some non-human service guardians seldom sought collaboration or gained the confidence of institutional staff, and tended to act as 'functionary guardians,' that is to say legal guardians who may or may not be consulted, but tended to be consulted only when documents needed to be signed or emergency

medical decisions needed to be made.

Now, since she's been in the group home, she has had her cataracts done, and I didn't know it until after. So, you know, I had told the [Agency], and they talked to someone up there and told them that's all supposed to come through me. (8)

Well at this point I don't think it's any kind of language thing going on. At this point it's more that the caretakers do what they have to do, and there's no conversation. And also if there's a test that needs to be done, it usually needs to be done if there's any blood in the stool or if there's blood coming in, you know, from the mouth. That's when they would probably do, you know, they would send her. (10)

Although this range seemed well-supported by the data, it was not clear how the guardians determined if and when they needed assistance. Several guardians did report that they actively sought assistance from agency staff and board members. Others eschewed help from the agency, perhaps indicative of a sense of over confidence. However, if a client was institutionalized, most of the guardians actively sought to collaborate with institution staff.

How We Do This: Needing Affiliation

The extent to which the guardians need to have some sort of relationship with the person or people they are trying to help speaks to a degree of affiliation literally described by an Agency staff member as 'emotional connection' with their clients. Some of the wards and/or their families were angry about the guardianship assignment. Many of the wards seem to be older adults with varying degrees of intellectual or cognitive disability often rendering them incapable of much of a connection. It seemed as though the respondents again provided information indicative of a range of responses. Some guardians seemed to want an opportunity to bond with the person they were helping. Others accepted that this could not happen due to client infirmity. Still others denied a

need to form a connection with their client.

Once again, some of the guardians who approach this task with a human service background eschewed a need for this type of emotional connection. On working with a non-communicative older adult client, one guardian noted her expectations for a relationship: “But she’s not the type of person who would say, ‘Oh I wanna go out for lunch,’ or do anything like that.” Moreover, this respondent did not see an assignment with a client with whom she could have a relationship as especially important to her.

No, ‘cause I’ve had so many emotional connections with so many other people, my clients, I don’t need an extra one. No, it doesn’t. I mean my, I see my role as making sure she’s protected, making sure she’s taken care of, and making sure that nobody harms her or does anything to her that would hurt her in any way.
(12)

Under very difficult circumstances, a guardian with human services training was assigned to work with a disabled man who was vehemently opposed to living in an institution, and yet had been adjudicated incapacitated due to his inability to provide self-care, which endangered his life. He was frequently non-compliant with medical and hygiene issues. The guardian reported being placed in a position to get the client to ‘shape up’ under threat of eviction from the institution. Again, her expectations were low, but she reported empathizing with her client’s situation.

I think that we’ve gotten a better relationship. Like he’s definitely, he’s not nasty to me for the most part. He got nasty in that meeting, but on that level again I can’t blame him...I think it’s sort of, I don’t know if it’s developed into a friendship; although we try, we always try to connect on that level... (9)

If affiliation was important to them, many of the guardians were either able to detect an emotional response from their ward, or reported joining with institutional staff, home health staff, or Agency staff working on the case in service of seeking a sense of affiliation. Primarily, this need for affiliation seemed to be associated with the

socialization aspects of this case, possibly important to feeling integrated into the task of guardianship. On collaborating with peers at the Agency:

...I also think having these little social gatherings together, it gives all of us, you know, because everybody's dealing with some different things. I mean there's one man who has, he has a man who's got a lot of family problems; and he's quite active with this guy. And then we have other people who have different experiences and stuff like that. But I think that gives you more a sense of feeling like there is people there to help you and to back you up and stuff like that. (12)

And, a guardian talking about overcoming a strained relationship with a facility social worker:

She kinda gives me her, you know, her take on things. And, I kind of take that into account with, you know, what I want to do...It's nice to kinda hear that feedback, and to kinda have a positive relationship with the social worker, cause you know, she's like the one that I have. She's, you know, pretty much doing everything. (6)

This expressed need for affiliation differed from participant to participant and was not necessarily associated with professional status. However, if affiliation was important to a good volunteer experience, those without a human service background seemed the most discouraged by this inability to connect with clients, staff or both. One guardian noted she rarely saw her client, who she described as chronically mentally ill, institutionalized, and dismissive of her help from the beginning. She described her interest in working with a new client, one with whom she could connect:

I think that would have been more rewarding, more interesting, because now you're dealing with... Well, I'm going to say I assume you get to be more of a friend to somebody you can talk to, and of course, you're going to swap stories, and you know... So, you're going to know that person's life prior to putting them in the situation they're in at that time. (8)

How We Do This: Asking For Help/Seeking Training

The respondents' reports indicated that each client situation was unique. The

extent to which each guardian had experience working on previous guardianship cases, or had human service training, seemed to inform their sense of asking for help and for formal and informal training. Again, as reflected in ‘how we deal with conflict and solve problems,’ a range was established reflective of reports from some of the guardians that they requested guidance under many circumstances to guardians who rarely asked for help and felt little or no need for formal training.

At times, a more assertive guardian style seemed to come at the cost of collaboration or an interest in seeking help, however. One human service profession noted: “They wanted me to go to them [*the Agency*], because...they felt that I needed a support system. I *don't* [emphasis in the original]” (7). And, upon checking this specific theme during a second interview with a guardian who works in the human service field, she indicated: “I really never had any guidance from the Agency, believe it or not...I could do this without the agency....But again, that comes from my background of what I do in my professional life” (9).

Those with little or no human service training seemed more open to agency training and support. An interest in training and support was associated with case manager style, as well. Those with more of an interest in training and support tended to be more collaborative and less directive on cases.

I would say, number one, I felt very highly supported by the organization, and always knew that they would be willing to help and able to help. And then also did take advantage of some of the more like formalized opportunities for some training, those sorts of things. (11)

And then also [*the Agency*] also has this incredible educational program where they're always bringing - I've been to a couple of their seminars where they're bringing people in panels to talk...and they're just really insightful and informative, and it helped me in my daily life in understanding things with my

own family, or people that have come to me to ask me questions about what it is to be a Guardian, or Alzheimer's, or being a caretaker, or all those kind of courses.
(2)

On the difference between human service professionals and non-human service professionals as volunteer guardians, a guardian who is a social service administrator ultimately offered her opinion of the most important aspect related to volunteer guardianship:

I think probably most of the people we have are non-professionals that are being volunteers. I just think you need to care; you need to have that piece. And you need to be able to have a backbone; because as we both know, some people don't get one. And so you need to be able to stand up for that person and advocate for 'em. (12)

Discussion

In the face of declining services and a rapidly expanding older adult population, volunteers should be considered in all aspects of social service provision. Exploring members of a community who choose a very intense, high commitment task helps to inform us about who may be interested in tasks such as this in the future, and perhaps more importantly, how to keep these people engaged.

This research elicited information that permitted a comparison of operational styles across the participants. Those who work in human service professions tended toward a more assertive, active case manager style, often with all that implied (i.e., requiring little information about the case situation prior to accepting the assignment, and tending to require or seek less supervision). Several of the non-human service professionals gravitated toward a more active case manager style as their confidence and sense of mastery grew. However, some did not seem to grow in the role. (Time as a volunteer guardian was not requested information, but it was implied by some respondents.) It is unclear whether this was related to their own reticence, the inability of

the institution to join with them (as some of these clients were institutionalized), or whether the Agency specifically matched those with a non-human service professional skill set to specific wards.

There seem to be clear implications with regard to retention in knowing the volunteer's skills, talents, and interests. Professionals who eschew support may respond to a different model of supervision. It seemed as though training and support were very important to new guardians, particularly those without human service training. It may also be important to ascertain how important it is to match a guardian with a client they feel is appropriate, or to work with those who note that affiliation is an important marker of volunteer satisfaction to join with staff, family, and agency members whenever possible. Many guardians indicated a high degree of comfort in working alone in service of their client(s). Some new guardians may be more inclined to continue if they are mentored by other guardians, invited to collaborate with other guardians, and actively attend agency functions. Affiliation with a volunteer organization, its mission, and their peers has been found to be an important variable in both recruitment and retention of volunteers (Hager & Brudney, 2004, 2011; Haski-Leventhal & Bargal, 2008; MacDuff, Netting, & O'Connor, 2009).

This research has limitations related specifically to its design; that is to say, it was cross-sectional and relied on a sample of volunteers from one agency, all of whom self-selected to be volunteer guardians and to be involved in this study. Two of the participants were not currently active volunteers. However, other inactive volunteers declined to be interviewed. Therefore, results were limited with ability to draw conclusions about why people chose not to continue as a guardian. Furthermore, the

Agency did not have comparative statistics and sampling was limited to the Agency's mailing list.

Despite these limitations, there are opportunities to understand what has been gleaned from this research in order to develop effective and successful practice models. The agency at the center of this study is a freestanding volunteer agency. This is the only service they provide. Opportunities to test this model in existing social service agencies, however, may provide us with different knowledge regarding successful recruitment and retention of volunteer guardians, specifically with regard to how volunteer guardians are matched with clients, as well as how they are supervised and monitored. Conflicts may be inherent in terms of perception of organizational culture, and paid staff may feel threatened in some ways by the presence of volunteers (Netting, Nelson, Borders, & Huber, 2004). Therefore, these issues must be taken into consideration in model and program development.

There are other important implications. Developing a model of volunteer guardianship for use with different agencies types, such as faith-based organizations, especially religious congregations that may be motivated to provide services to their neighbors in their communities, may also require close examination with regard to how volunteer guardians are supported. The volunteer guardians who participated in this study had the benefit of going to an agency board of directors with diverse talents upon whom the guardians could rely on to be problem solvers. Faith-based organizations may need to organize within their religious communities to cultivate the problem-solving professionals among them. Testing of a model in these direct service situations may inform development of successful models and inform policy regarding the provision of

services to older adults in the community, as well as to policy on volunteerism.

Article 2: Quantitative and Qualitative Findings

Volunteer guardians in the community: A complex volunteer task

The Corporation for National and Community Service (CNCS) estimated that Americans contributed 8.1 billion hours of volunteer service in 2010 (CNCS, 2011a). Independent Sector (2012) reported that the average dollar value of an hour of volunteer service is \$21.36 in 2010, and that the total estimated value of volunteer service in 2010 was \$173 billion. Volunteers are important, and may become increasingly important, in providing service in the community during times of economic stress. Yet, between 2009 and 2010, fewer volunteers contributed more volunteer hours (CNCS, 2011a). CNCS noted that 36.5% of Americans who volunteered in 2009 did not return to contribute volunteer hours in 2010 (CNCS, 2011b). Recruitment and retention of volunteers are always issues in practice (Eisner, Grimm, Maynard, & Washburn, 2008; Hager & Brudney, 2004a; 2004b). The purpose of this study is to explore reasons why people volunteer at a specific volunteer task, volunteer guardianship, and to compare these reasons to a sample of traditional volunteers using a validated measure of motivation to volunteer.

Volunteerism is a widely varied activity. Dimensions include variation across type of activity (e.g., library volunteerism may be substantively different from serving on a public board), as well as intensity. Research on volunteerism is further complicated as it is viewed through the lens of different professional disciplines (e.g., sociology, psychology, social work, economics) using different definitions of volunteerism

(Hustinx, Cnaan, & Handy, 2010; Wilson, 2012). Conceptual developments on the definition of volunteerism have more fully explored personal gains for what has been primarily considered as an altruistic activity (Cnaan, Handy, & Wadsworth, 1996). In addition, conceptual consideration has been given to volunteer task intensity, as tasks measured by the hour (episodic tasks) may be substantively different from time-bounded tasks of higher intensity, such as Habitat for Humanity, or programs that require a great deal of structure and commitment (Morrow-Howell, 2010). For the purposes of this research, volunteerism has been defined as time given freely without personal or monetary consideration by an individual for the welfare of others (Omoto & Snyder, 1995).

Research on Motivation to Volunteer

Volunteerism has been the subject of considerable research over the past 30 years (Wilson, 2012). Much of the research since the 1990s has sought to understand individuals' reasons or motivations for volunteering. Research on motivation to volunteer (MTV) has described a unidimensional model (Cnaan & Goldberg-Glen, 1991), and has developed into a multi-dimensional construction of MTV as indicated in multiple studies by Clary and colleagues. (1991; 1996; 1998). Their six-factor model of MTV (i.e., values, understanding, social, career, protective, and enhancement factors) has been developed from a validated instrument of MTV, the Volunteer Functions Inventory (VFI; Clary et al., 1998). The conceptual model of MTV upon which the VFI was developed is defined by a functionalist perspective: people will seek out and engage in volunteer tasks that fulfill a personal motive or need. Therefore, different individuals may pursue the same opportunity for different reasons, and these reasons may be subject to change over

time (Clary & Snyder, 1991; Clary, Snyder, & Stukus, 1996; Clary et al., 1998; Mannino, Snyder, & Omoto, 2011). Research has been conducted to test this model at different times in the volunteer process including research by the original authors and others (Finkelstein, 2008a; 2008b; 2010; 2011, Finkelstein, Penner, & Brannick, 2005; Houle, Sagarin, & Kaplan, 2005; Okun, Barr, & Herzog, 1998).

Much of the aforementioned research on volunteerism describes and defines an individual's motivation to volunteer. The intense nature of the task and the volunteers' commitment may make a specific type of volunteerism, such as volunteer guardianship, unlike most other volunteer opportunities. Attempting to understand why an individual chooses and remains with a particular volunteer task, and therefore whether there are substantive differences between people who chose certain types of volunteer tasks, may promote a deeper understanding of volunteerism. On a more practical level, it may inform recruitment and retention of volunteers. Therefore, this research sought to understand more fully why members of a community would volunteer to become the legal guardians for incapacitated older adults and disabled members of their community.

Method

Sample

The study sample for this article includes 12 volunteers, including nine active, two inactive, and one 'past volunteer not currently interested in helping.' The sample consisted of 3 men and 9 women with a mean age of 53.8 years ($SD = 11.02$; range = 34-70 years). Nine volunteer guardians (75%) were employed full or part-time. Five of the 12 (42%) respondents were human service professionals (social workers, social service

agency administrators, and clergy). All 12 volunteers reported both formal and informal volunteering histories.

Procedure

Following approval from the University of Maryland, Baltimore Institutional Review Board, letters of invitation were mailed to potential participants who were recruited as previously noted. Upon establishing interview time and location, informed consent was obtained. Interviews were audio taped and lasted approximately 45 to 85 minutes. Respondents completed a brief demographic questionnaire and the VFI (Clary et al., 1998) at the conclusion of the interview. Following the analysis of the qualitative data, 3 respondents from the original set of 12 respondents were contacted for a second interview. This provided an opportunity to further address important issues and to member-check, a strategy of qualitative methodology that seeks to verify data analysis results with respondents (Padgett, 2008). All interviews were conducted between June 2011 and March 2012.

Qualitative Interview Guide

Consistent with our interest in exploring why volunteer guardians choose and continue in this specific volunteer task, the interview guide was designed to elicit the volunteers' perceptions beginning with the broadest possible question, 'please tell me about your experience as a volunteer guardian.' Probes included questions about how they found this specific opportunity, their perception of their day-to-day experiences as a guardian, their first assignment, and their sense of the changes in the task over time. Other questions included asking about their perceptions with regard to a difficult situation and a satisfying situation. In terms of retention, volunteers were asked what they felt

helped them continue as guardians and included probes related to training and family support. In addition, perceptions of how this experience had affected and/or changed them were elicited. The interview guide for the second interviews asked more specific follow-up questions based on the first interviews with these specific respondents, and solicited their feedback regarding the salience of qualitative findings at that point in the research process.

Measure

The Volunteer Functions Inventory (VFI; Clary & Snyder, 1991; Clary, Snyder, & Stukas, 1996; Clary et al., 1998) is a 30-item inventory of motivation to volunteer (MTV). It was developed based upon a functionalist framework regarding why people volunteer; specifically that people will volunteer at the same task for their own individual reasons with the expectation that performing that task will meet these needs. These reasons or 'factors' include: (a) 'values,' to express humanitarian and altruistic concerns toward others, (b) 'understanding,' to learn more about something new and/or practice skills that might otherwise not be used, (c) 'enhancement,' to support one's ego or self-esteem, (d) 'protective,' to mitigate guilt about the circumstances of those less fortunate, and/or to address personal negative affect, (e) 'career,' to learn new career skills and/or support current career responsibilities, and (f) 'social,' to spend time with friends and to engage in an activity viewed favorably by society. The VFI uses a seven point Likert scale with anchors ranging from 1 = *not at all important/accurate for you* to 7 = *extremely important/accurate for you*. Cronbach's alpha coefficients for each of the factor subscales range from .89 ('career') to .80 ('values') with an average interscale correlation of .34 (Clary et al., 1998). Clary and colleagues (1998) also reported sample

means for each of the six factors ranging from high to low are: 'values' ($M = 5.82$, $SD = 1.00$), 'understanding' ($M = 4.91$, $SD = 1.32$), 'enhancement' ($M = 4.27$, $SD = 1.43$), 'career' ($M = 2.74$, $SD = 1.54$), 'protective' ($M = 2.61$, $SD = 1.37$), and 'social' ($M = 2.59$, $SD = 1.30$). 'Values' and 'understanding' are considered to be more other-focused factors (Mannino, Snyder, & Omoto, 2011). The VFI has been validated by other researchers with similar results (Allison, Okun, & Dutridge, 2002; Okun, Barr, & Hertzog, 1998).

Demographic data

Respondents were also asked their sex, year of birth, marital status, employment status (full-time, part-time, self-employed, retired), current volunteer status, and formal and informal volunteering history.

Data Analysis

Qualitative data were analyzed using the generic inductive qualitative method, a technique which employs elements of grounded theory, but is prescribed when small samples prohibit theory development (GIQM; Hood, 2007). Interviews were conducted and analyzed in groups of two to three interviews. Open coding using constant comparison permitted early thematic development, which then informed sampling choices for the next set of interviews. The purpose of GIQM is to develop sustentative themes. Categorical saturation may be achieved, but is not required. GIQM also allows for the comparison to existing models or theories (functionalism). GIQM may be best employed with unexplored topics in pilot situations. Quantitative data were analyzed using one sample t tests to compare samples means from the study by Clary and colleagues (1998) to the sample means for this study sample.

Results

Several themes were identified. These included ‘helping the unbefriended,’ which described why many of the volunteers chose this task, and ‘learning skills,’ an interest expressed by many of the respondents relative to the information they learned as they worked with wards. In addition, ‘giving back/paying forward’ seemed related to ‘helping the unbefriended’ in that it described in a larger sense how many of the volunteers felt they were supporting their community; and, ‘satisfaction/gratitude,’ which described whether this was important to the volunteers, and if so, how they found a sense of satisfaction in this volunteer task.

Helping the Unbefriended

All of the respondents spoke often about their strong desire to help those they perceive to be unable to adequately help themselves. Several of the respondents saw their mission as volunteer guardians as an individual task. As one guardian noted, “I just make sure that he, you know, is happy; that he’s content...I try to make sure that he’s got the best quality of life that he can” (5). Many had known older adults neighbors who were isolated in the community, or had volunteered for agencies, such as Meals on Wheels, and had personally experienced individuals in the community who had no one to help them. At times, the guardians would express a sense of frustration that their clients had been forgotten by families or neighbors, and saw their mission as champions of the ‘unbefriended.’

...but how about all the other little grannies who don’t have anybody to get their groceries. (1)

...you think about these other people who just don’t have any support – *don’t have anyone*. And I think that’s kind of, you know, the hardest part of the story –

that *they just don't have anyone*. There's no family. There's no friends who are around or can look in on them. (5)

...a lot of people are always willing to help out with all the animals, pets... People are always willing to help out pets and children. I just kind of felt like, you know, that's [helping older adults who need guardians] not like an area where people generally put their time to be to. That's not cute and cuddly.... The hardest part of the story - is that they don't have *anyone*. There's no family. There's no friends who are around or can look in on them. (6)

In one specific situation, a guardian (2) noted that one of her clients, who was an unpaid family caregiver most of her life, had not been adequately financially prepared for old age. Initially, the family had responded to inquiries to participate in this woman's care, but their interest seemed to wane when it was made clear that there would be no financial windfall for the family. This theme was noted by several guardians.

Most of my wards have been - and I've had four - have been kind of wards of the state because they had no money, and nobody really wants take care of them basically. That's the bottom line, right? It's sad to say that, because if there was money involved probably somebody would step forward.... (2)

The guardians repeatedly used the term 'advocate,' and viewed themselves at times as the champions of their clients. They became accomplished problem solvers and relationship experts on behalf of helping their clients get what they needed. One guardian described designing an incontinence undergarment for her client to preserve her client's level of placement. Another told of advocating on behalf of her client to undergo cataract surgery and hired a companion against the advice of the facility staff.

When families are involved, the guardians receive support and advice from the Agency with regard to handling potentially complicated and difficult collaborations. Often, families have been accused of malfeasance and may be resentful of the presence of a legal guardian. Ultimately, one guardian, who had strongly advocated to create a discharge plan that would support his client in the client's own home, chaired a family

mediation session complete with a professional mediator and documentation (5). Each of these examples was preceded by strong suggestions of advocating for the rights and liberties of those who cannot speak on their own behalf.

Several of the guardians expressed an interest in advocating in service of just one person and seemed quite comfortable to be working at an individualist task as opposed to group task with other volunteers.

I'm looking for maybe just one person that I can make a difference in their lives...I found it to be one of the more meaningful things that I've ever done. Really. Just to journey with another person, and to be responsible for that person. (3)

However, despite this focus on one individual – a micro perspective – many of the volunteers returned repeatedly to the idea that advocacy for the unbefriended is actually a task of civic responsibility.

And it struck me that there's two things in this world that make me very, very angry - and that's people that take advantage of kids, and people who take advantage of the elderly and those that are needing help. (5)

I firmly believe that there's those of us who are put on earth who can't take care of themselves for whatever reason. It could be mental health, it could be, you know, maybe we're not the brightest person God ever put on the face of this earth or whatever. And I do believe those of us who do have a brain-we can walk, we can hear, we can talk, we can think-have some responsibility for taking care of the people. (12)

Many of these volunteers reported being active in several civic tasks. Again, this sense of civic or societal responsibility was voiced, “Do *something*. Leave it better than you found it” (9). Another volunteer who was involved in several community volunteer projects noted, “And that's part of the reason why I decided to do the guardianship – to kind of extend the humanitarian part of my life, to give back to the community” (10). Some of the volunteers noted their interest in involving their family members, friends,

and other community members in their volunteer tasks in order to model positive civic behavior and spread the word to others.

One of the most beautiful things that happened at the last nursing home was I was the Girl Scout leader, and we chose that nursing home as being our place where we were going to make friends. And each girl was given a particular person to like be their grandparents. And we did many service projects. We'd come and sing for them. We work with them, and so forth. And, to me, just seeing that, and also for the parents to see that as well, how their girls could really directly improve the life by doing something small was very powerful. (2)

Learning Skills

Many of the guardians professed an interest in learning skills to assist their own families.

So, you know, the best thing about this whole thing is that I really got an education – Social Security, going to the doctors, doing all the tests, selling the mobile home, which I never thought in all my life I'd ever do. (3)

Other guardians noted that volunteering as a guardian offered an opportunity in self-growth.

Part of what they now think is Alzheimer's, and since I had a mother and a father that died of it, I have to watch out for it, is the more new stuff you learn how to do, you build new paths in your brain. (12)

Several of the guardians are human service professionals. However, none of the guardians indicated that they brought skills to the task as a result of having cared for their own loved ones. More often, they expressed a desire to acquire skills for the future.

“And also at the same time I was learning a great deal of how to care for my own elderly parents and so forth” (2).

Giving Back/Paying Forward

Moreover, several of the guardians felt motivated to volunteer at this task in order

to return a kindness shown to a family member. One guardian noted that he was unable to provide assistance to his father who lived at a distance, but felt secure that care was provided by a family member. He saw volunteer guardianship as an opportunity to ‘pay back’ this kindness. On another occasion, a volunteer offered a similar scenario, but one that included a community effort.

My parents are deceased 10 or 11 years now, and while they lived in Pennsylvania, about 50 miles away and there were people – friends of ours – they kind of looked after them. Not in any official capacity, but just looked in on them and everything. And, I said, that was nice. (5)

Several of the guardians tending toward the older end of the age range for the sample, seemed to identify with their clients on a very personal level. For these volunteer guardians, disability and helplessness seemed less of an abstraction. One guardian, a 68 year old woman, noted,

And, you know, I can remember saying this to the judge - you know someday I'm going to be in that situation where somebody's going to have to help me. So, I guess it's like you pay it forward. (8)

Satisfaction/Gratitude

Many of the guardians reported finding some personal satisfaction in providing a much needed service, and noted seeking recognition for their task from the public at large (including participation in this research, which several of volunteers hoped would garner interest in their task from other communities). Often, though, guardianship comes at a time when people are not welcoming (including clients and families), or when clients are not able to express gratitude, generally as a result of cognitive disability. Therefore, the guardians tended to find satisfaction without expecting expressions of gratitude from their clients. One guardian who reported she had a quite contentious client noted, “I did find it satisfying in the sense that I knew I was helping her. Whether she knew it or not,

that's kind of in the air" (8).

Several other guardians mirrored this sentiment. For example:

There's times when he doesn't want to see me. There's times when I think he's glad to see me. I mean, it's just, you know, who knows? ...probably if I thought about it, I probably would figure I was wasting my time thinking about it. (9)

However, when unable to join with their particular client, many of the guardians reported finding satisfaction in assisting facility or in-home staff in providing care to their clients.

In speaking specifically about nursing home staff, one guardian noted, "It's been just an amazing experience. Every – there have been moments with my individual wards that have been an incredible experience to see the goodness in people, and how they care for people" (2). And another guardian intentionally cultivated a more positive relationship with facility staff, initially to more effectively advocate on behalf of her client, but also because it helped the volunteer feel more involved and useful. She reported,

You know what's great now is that with the social worker, I talked to her, and I say, 'well, what do you think about this? I was planning on doing this.' She kinda gives me her, you know, her take on things. And, I'll take that into account with, you know, what I want to do. Like, you know, I wanted to go and buy [my client] some new clothes. And, so, I was like, you know, well what do you think would be the best considering he's here, what would be most appropriate? And, she tells me, you know, she actually said, you know what, 'The jeans and a shirt you bought him, you know, [my client] looks great in them.' It's nice to hear that feedback, and to have a positive relationship with the social worker, cause you know, she's like the one that I have. She's, you know, pretty much doing everything. (6)

Quantitative Results

Quantitative analyses of the VFI were conducted to complement the qualitative findings; see Table 1 for the VFI factor *M* and *SD* for the Clary et al. (1998) sample, the sample used in comparison throughout this study vis-a-vis the current volunteer guardian sample. Volunteer guardians scored significantly lower on the 'career' subscale ($t(11) =$

-3.45, $p = .005$) than the volunteers described in Clary et al.'s (1998) sample. Volunteers guardians also scored significantly lower on the 'enhancement' subscale ($t(11) = -3.27, p = .007$). In addition, two other subscales (Values and Protective) approached statistical significance at $p < .10$ and may be worthy of further investigation. Volunteers guardians scored lower on the 'protective' factor ($t(11) = -2.04, p = .066$), and of particular interest with regard to exploring the differences between the general volunteer population and volunteer guardians, the guardians scored higher on the 'values' factor ($t(11) = 2.07, p = .062$) than the general population of volunteers. Table 3 depicts these results by factor. Table 4 provides a bar chart comparison of results.

Table 3

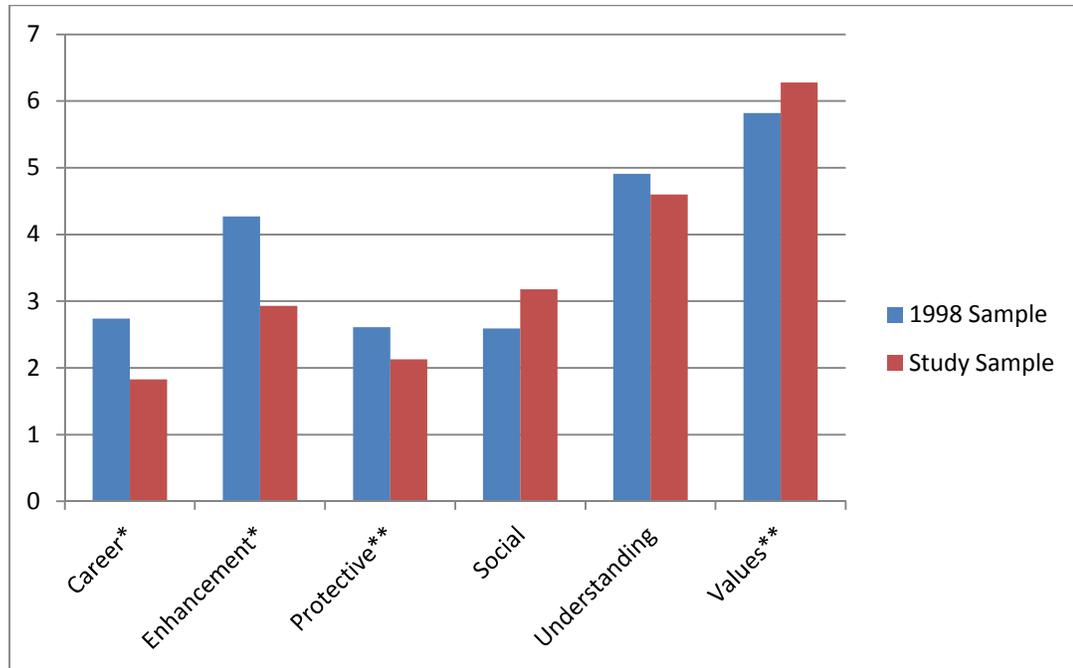
Volunteer Functions Inventory^a Subscale Means for 1998 Sample and Study Sample

Subscale	Clary et al., 1998 Sample $M(SD)$ ($n = 467$)	Study Sample $M(SD)$ ($n = 12$)
Career	2.74 (1.54)	1.83* (0.90)
Enhancement	4.27 (1.43)	2.93* (1.41)
Protective	2.61 (1.37)	2.13** (0.81)
Social	2.59 (1.30)	3.18 (1.29)
Understanding	4.91 (1.32)	4.60 (1.57)
Values	5.82 (1.00)	6.28** (0.77)

Note. The mean age for the population is 40.9 years. The mean age for the sample is 53.8 years. * $p < .05$, two-tailed. ** $p < .10$, two-tailed. ^aClary, E., Snyder, M., Ridge, R., Copeland, J., Stukas, A., Haugen, J., & Miene, P. (1998). Understanding and assessing the motivations of volunteers: A functional approach. *Journal of Personality and Social Psychology*, 74(6), 1516-1530. The VFI uses a one to seven point Likert scale (*not at all important/accurate for you to extremely important/accurate for you.*)

Table 4

Volunteer Functions Inventory Subscale Means for 1998 Sample and Study Sample Bar Chart



Career: motivated to learn new career skills or to support current employment

Enhancement: improving self-esteem

Protective: motivated to address negative affect; mitigate guilt

Social: interest in spending time with friends; engaging in a prosocial activity

Understanding: Learning more about an issue; practicing unused skills

Values: motivated by altruism/humanistic concerns

Discussion

These findings suggest that the volunteer guardians are less motivated to learn career skills or to enhance their self-esteem than the general volunteer population.

Further, the findings suggest volunteer guardians are even more motivated by humanitarian interests than the general population of volunteers. The quantitative results are used to frame, describe, and help explain the qualitative findings. It should be noted that the highest mean score on the VFI among the six factors for Clary and colleague's

(1998) sample is 'values' ($M = 5.82$ using a one to seven point Likert scale) indicating that sample of volunteers is motivated by an interest in helping others, and, as Clary and Snyder (1991) note "to help a person express deeply held values, convictions, and dispositions" (p. 123). Volunteer guardians may be even more motivated to volunteer for these reasons ($M = 6.28$). Indeed, the guardians' interviews strongly highlighted their need to help the unbefriended and those who could be or had been victimized. Many respondents routinely voiced a certain amount of frustration with a society that ignores older adults, and used terms, such as 'advocate,' to demonstrate their strong interest in championing those who the guardians perceive cannot protect themselves. This finding may be similar to other very challenging volunteer tasks, such as volunteer ombudsmen (Nelson, Netting, Huber, & Borders, 2004). Court Appointed Special Advocates (CASA), who volunteer as children's guardians, also may face a very difficult task, and although some research exists that describes the effectiveness of CASA volunteers, none was found exploring why people volunteer to be children's guardians (CASA, n.d.; Litzelfelner, P., 2000).

Among volunteer guardians, it seems consistent with the original research on the VFI that the guardians would most likely not be motivated by an interest in gaining knowledge about a new career or forwarding their own career objectives. Rather, this seems to be a factor attributed to a younger cohort of volunteers (Clary & Snyder, 1991; 1996; 1998; Hustinx et al., 2010). None of the qualitative findings of this study indicate that volunteer guardians are motivated to learn about new careers. Indeed, several of the guardians are already employed as human service professionals.

However, some of the guardians indicated an interest in acquiring knowledge at

this task in order to assist their own older adult relatives and friends. This qualitative theme, 'learning skills,' seemed more consistent with the VFI factor 'understanding,' which is defined by Clary and colleagues (1998) as a knowledge function, specifically, "...the opportunity for volunteerism to permit new learning experiences and the chance to exercise knowledge, skills, and abilities that might otherwise go unpracticed" (p. 1518). Clary and colleagues' (1998) mean (4.91) and the mean for this sample (4.60) are comparable indicating that 'understanding' may be of some importance to both cohorts of volunteers.

In the VFI literature, factors such as 'enhancement' and 'protective,' are known as more egoistic or self-focused than 'values' and 'understanding,' which trend toward the more altruistic end of the scale continuum (Clary & Snyder, 1999; Clary et al., 1998; Mannino, Snyder, & Omoto, 2011). Indeed, the guardians scored below the comparison sample's already low mean on the 'protective' factor (i.e., volunteers are less motivated to volunteer in order to address their own depressive feelings, or to mitigate feelings of guilt). Moreover, the guardians scored significantly below the comparison sample's mean on 'enhancement,' a factor indicative of a need to bolster one's self-esteem. These lower scores on self-focused factors may mirror higher scores on 'values.'

An important theme among the guardians, 'giving back/paying forward,' seems absent from the VFI factor definitions. It is difficult to say whether this theme represents an emergent new factor specific to volunteer guardians, and possibly to other specific volunteer tasks. However, it does seem to be relevant in keeping with the strength of the qualitative findings associated with the 'values' factor ('helping the unbefriended'). All of the guardians spoke strongly of their interest in helping the unbefriended individuals in

their community, as well as holding a more global construct of helping the unbefriended in society as important. This duality of focus is noted by Mannino, Snyder, and Omoto (2011) who viewed volunteerism through the functionalist perspective and see the actions of volunteers as “personal *and* social, individual *and* collective” (p. 131). Indeed, in research conducted by Omoto and Snyder (1995) indicating additional and different VFI factors specific to AIDS volunteers, the authors noted an emergent factor titled ‘community concern.’ Essentially, AIDS volunteers in their research seemed strongly motivated to help in a community, in this case a virtual community, devastated by a deadly disease.

It is also important to note that ‘satisfaction’ as a theme was important to the guardians, and may be important, in one form or another, to all volunteers. However, satisfaction with a volunteer task is not expressly measured by the Volunteer Functions Inventory. Clary et al. (1998) did establish and validate an additional six question addendum to the VFI, which measures satisfaction with the task. In several models, volunteerism is viewed as a multiple step process. Musick and Wilson (2008) describe the volunteer process model similar to Snyder and Omoto (1992) who use a longitudinal perspective that includes antecedents, experiences, and consequences related to the task of volunteering. However, Clary and colleagues do note that, despite the measurement tool, the satisfaction of motivations may lead to a volunteer’s intention to remain. Other researchers support this assertion (Mannino, Snyder, & Omoto, 2011; Omoto & Snyder, 1995; Penner & Finkelstein, 1998). This research did not seek to measure satisfaction, but rather sought to understand whether satisfaction in this task was important, and if so, how the guardians sought satisfaction, especially in light of the inherent conflicts in this task

and diminished communication ability suffered by many of the clients.

Although not emergent as its own theme, many of the guardians specifically stated or implied that they liked to work with one person and did not necessarily need or seek the company and support of other volunteer guardians. Eagly (2009) indicated that there may be gender differences with regard to whether people pursue volunteer opportunities with agentic (individualistic) components versus collective (communal) components. The pursuit of an individualist volunteer activity seems somewhat unusual in light of our general understanding of most volunteer activities (e.g., serving on committees, volunteering at a library, etc.), and therefore may be worthy of further research with guardians.

The ideal of individualism versus collectivism has also been studied with regard to other models of volunteerism. Penner (2002) and Grube and Piliavin (2000) have addressed the issue of a volunteer 'role identity,' which is integrated over time. Finkelstein (2010; 2011) has looked at combining volunteer role identity with MTV specifically with regard to whether volunteers are motivated to pursue individual versus collective activities. Interestingly, her research indicates that a collectivist point of view is more closely associated with altruism (and it may be assumed with volunteers who may score more highly on 'values' and 'social' factors; factors associated with altruism as per Clary et al., 1998). Finkelstein notes that the individualist volunteers demonstrated more perceived responsibility with regard to social and political activism, but were also more closely associated with the 'career' factor. Although the volunteer guardians in the current study were not particularly highly motivated to gain career skills, possibly due to the mean age of the sample (53.8 years), they seemed to express both individualist and

collectivist tendencies. This may be related to volunteering to help an individual, while also addressing a larger social problem.

Limitations

There are several limitations to this research. It uses cross-sectional data representative of a small sample in one geographic area. Moreover, the participants volunteer for an agency that uses a specific model of training and service provision, that is to say a legal perspective. Other agencies may have different models of volunteer guardianship delivery, and could conceivably use techniques to manage volunteers differently. In addition, the VFI is not the only instrument used in volunteer research, and it, too, represents a specific model of MTV. As it was tested with a small sample in this research, additional testing would be indicated. Other research has sought to explore different theories and models, such as role identity, etc. (Finkelstein, Penner, & Brannick, 2005; Grube & Piliavin, 2000; Haski-Leventhal, 2009; Hustinx, Cnaan, & Handy, 2010; Penner, 2002; Shye, 2010). Moreover, Shye (2010) notes that the VFI factors may not be mutually exclusive (or exhaustive, as indicated by the research noted previously regarding hospice and AIDS volunteers, and research that implied additional factors when using the VFI in combination with open-ended questions). Shye's criticism seems important in the face of differentiating between the 'career' factor and the 'understanding' factor in this research, for instance.

Implications

The setting for this research, an agency committed only to providing volunteer guardianship services within the framework of a legal perspective, makes it qualitatively different from a social service agency with a multi-faceted mission or a faith-based not-

for-profit organization. Additional research on this type of volunteerism could be conducted using larger samples in other areas of the country where social service and faith-based models of delivery may predominate over a legal model. In addition, further exploration of agentic versus collectivist motivation, especially as it relates to an individual versus societal perspective, may help to better inform why people volunteer as guardians.

Implications for practice include an improved understanding of how to recruit and retain volunteers, especially volunteers who are interested in this demanding task. Qualitative findings related to ‘helping the unbefriended,’ ‘giving back/paying forward,’ ‘learning skills,’ and ‘satisfaction’ have implications with regard to what may be important to volunteer guardians. With regard to findings specific to this research, it may be interesting to note that volunteer guardians seem similar to the comparison sample, which included respondents performing a wide array of volunteer tasks, and thus the difference may be related more to *who* they are as opposed to *why* they provide this service. Although the volunteer guardians seemed less motivated to learn career skills or enhance their self-esteem and more motivated by humanitarian interests than the comparison sample, these results mimic the motivations of the comparison sample. Thus, the professional training of the guardians may be of particular interest in a practice setting as 5 of 12 respondents had been trained as human service professionals. This may be a critical point with regard to targeted recruitment efforts. As service agencies are strained by financial demands, volunteers may be motivated to help, offering the opportunity for agencies to extend and augment their services, but only if, in general, agencies know who to look for and how to keep them engaged. Improved knowledge should help to drive an

increased understanding of volunteerism on regional and the national level.

Increased knowledge about specific volunteer tasks, such as volunteer guardianship, should inform policy, both local and national, with regard to provision of service to older adults in the community. Volunteer guardians provide a very special and specialized service. To the extent that our society feels compelled to provide assistance to older adults in their community, we may become more reliant upon volunteers to provide these services.

Article 3: Qualitative Findings (Volunteer Guardians and Key Stakeholders)

“We’ll take care of everything:” Volunteer guardians and organization perceptions of a complex volunteer task.

Volunteers play a role in service delivery in our society. Many American human service organizations have a volunteer component; many may consider adding a volunteer component in order to supplement service delivery in a down economy. Volunteers are valuable having provided an estimated \$173 billion dollars in service in 2010 (Independent Sector, 2012). However, there has been a recent decrease in volunteer retention. The Corporation for National and Community Service (CNCS) notes that only 63.5% of volunteers continued in volunteer service from 2009 to 2010, a two percent decrease from 2008 to 2009 (CNCS, 2011a). Recruitment and retention continue to be key components to a successful volunteer experience both for the individual volunteer and the organization (Hager & Brudney, 2004a; 2004b; 2011). The purpose of this study was to examine and compare the perceptions of a group of volunteer guardians and key agency and board members regarding recruitment and aspects of retention.

There has been significant research on volunteer initiation and longevity of service. Much of this research has focused on the individual volunteers' perceptions of the experience including their motivations (Clary & colleagues, 1991; 1996; 1998; Omoto & Snyder, 1995), volunteer role, and personal identity (Grube & Piliavin, 2000). Subsequent research on 'intention to remain' as a volunteer takes into consideration other possible factors, such as commitment or attachment to the organization, a sense of accomplishment, conflict within the organization, and perception of training (Davila & Chacon, 2007; Flynn & Feldheim, 2011; Greenslade & White, 2005). Hidalgo and Moreno (2009) found social relationships and social support from volunteer peers to be instrumental to volunteer retention. Thus, it appears as though a satisfactory volunteer experience may be related to volunteer perception of several components of the experience, such as training, attachment, support, and conflict.

Formal volunteerism is defined as a task performed willingly without consideration for compensation, which benefits strangers, and is supervised by a formal agency (Cnaan, Handy, & Wadsworth, 1996). Volunteer guardianship, because of the intense nature of the task, may be unlike most other types of volunteer opportunities. Volunteer guardians assume legal responsibility for the life of a stranger. Clients may have no supports in the community, or involved family and friends may be incapable of or inappropriate for guardianship. Clients may have significant medical, social, financial, and legal issues and may be too cognitively incapacitated to participate as a good informant in decision-making. Therefore, the volunteer who is attracted to this type of task and the agencies that support the provision of this type of service may be unique.

Volunteer Recruitment

Volunteer recruitment may be related to understanding how volunteers identify with a volunteer organization. For example, those who volunteer for multi-location charities may be more committed to their association with a local chapter than the larger charitable mission (Hustinx & Handy, 2009). Hager and Brudney (2011) reported that many organizations may simply have a mission to which the general public does not respond positively, such as some chronic illnesses, mental health issues, and undesirable or illegal activities (e.g., homeless and anti-drug use charities), and, therefore, may experience difficulty recruiting volunteers. Furthermore, Marx (1999) noted the importance of understanding why individuals may be motivated to volunteer for a specific organization. Indeed, anecdotally, it may be acknowledged that those who volunteer for an organization with an ‘undesirable’ mission may have some experience with the issue or may have interfaced with organization on a non-voluntary basis prior to volunteering. It has been noted that many hospice volunteers, for example, are motivated to volunteer for hospice organizations in part because they have experienced the death of a friend or loved one and/or have used hospice services in the past (Claxton-Oldfield & Claxton-Oldfield, 2007).

Volunteers may most frequently be recruited by informal means; they learn of the opportunity from others, usually other volunteers, and therefore volunteers themselves may be the best recruiters (Nagchoudhuri, McBride, Thirupathy, Morrow-Howell, & Tang, 2005). More formally-structured recruitment programs may include methods similar to those utilized by the successful recruitment program put forth by Experience Corps in Baltimore including increased community presence in churches, community organizations, sponsored housing, etc. (Martinez, et al., 2006). Indeed, Experience Corps

Baltimore has a formal screening process to improve retention (Fried et al., 2004). For volunteer guardian agencies, the Coalition of Wisconsin Aging Groups indicated that ‘word of mouth’ and volunteers recruiting volunteers tended to be among the most productive recruitment activities (CWAG, no date).

Unfortunately, many organizations that have a volunteer component may know little about volunteer management and/or may not have the financial resources to provide professional volunteer management. Using a sample of approximately 3,000 not-for-profit agencies, Hager and Brudney’s (2004a; 2004b) study noted that more than 20% of agencies report sufficient recruitment as a big problem, and more than 65% cited recruitment as a small problem.

Volunteer Retention

Professional volunteer management is critical in both recruitment, but especially in retention (Hager & Brudney, 2004a; Netting, Nelson, Borders, & Huber, 2011; Vinton, 2011; Yanay & Yanay, 2008). In research conducted by the Urban Institute ranking agency compliance with volunteer management best practices, including matching skills with the volunteer assignments, providing training and professional development, evaluation of volunteer time, and use of trained agency staff to manage volunteers, these practices were often not used regularly (Hager & Brudney as cited in Eisner, Grimm, Maynard, & Washburn, 2009). Eisner et al. also noted that the percent of volunteers who chose not to continue to volunteer at all rose from 32 to 36% between 2005 and 2006.

Research on volunteer retention offers a panoply of reasons why volunteers quit, including: issues with program administration (Tang, Morrow-Howell, & Choi, 2010), a balance between personal issues and organizational competence and support, specifically

related to meeting the volunteer's perception and expectation around the task (i.e., a good match), a perception of lack of support in terms of guidance and training, issues with the governance of the organization as a whole, volunteers' feelings of recognition (Hustinx, 2010), and a discrepancy between perceived and actual experience (Yanay & Yanay, 2008). Thus, it may be said that retention – in the form of task commitment and volunteer longevity – is many-faceted and complex, includes personal and organizational factors, and may rest on volunteers' perceptions. For example, Boezemann and Ellemers (2008) noted volunteers' sense of importance of the task may predict pride and that perceived organizational support may predict a sense of organizational respect. It may be argued that constructs such as pride and respect are subjective, and based upon individual volunteers' perception of their experience.

Method

This paper is part of a larger study that sought to address why people in the community would offer to volunteer as legal guardians for strangers in their community. As such, the interviews with the key stakeholders were conducted to further explore and build upon the results gleaned from interviews with the volunteer guardians.

Study Site and Participants

Participants for this study included 12 volunteer guardians, 3 board members, and 3 agency staff members from a not-for-profit volunteer agency in a mid-Atlantic state. This agency has had volunteer guardianship as its sole mission for more than 14 years. Volunteer guardian participants were selected from the agency's mailing list, which included active, not currently active, and non-guardian agency volunteers. Agency stakeholders (board members and staff members) were selected from a separate mailing

list provided by the agency. Within the limitations of the mailing lists, sampling was conducted to be as representative as possible, including active and inactive volunteer guardians, and active and inactive stakeholders (i.e., choices to interview were made based on the participants' status as active or inactive, and as to their gender).

The volunteer sample was comprised of 3 men (25%) and 9 women (75%) with a mean age of 53.8 years. Nine of the respondents (75%) were listed as 'active guardians' on the agency mailing list. Three (25%) were listed as 'inactive guardians.' Five of the 12 respondents (42%) were employed as human service professionals (social service administrators, social workers, and clergy). Fifty percent were employed full-time. Two respondents (16%) were retired. All of the respondents reported prior volunteer experience.

Procedures

All procedures were approved by the University of Maryland, Baltimore Institutional Review Board. There were 33 names and addresses of volunteer guardians made available by the Agency. An initial invitation was sent by mail to each volunteer guardian, which included an 'opt-out' postcard. Those who declined by postcard within two weeks were removed from the prospective participant list. Phone calls were made to those who did not opt out with the intention of contacting a representative number of guardians of either gender, as well as across all four categories (active, inactive, volunteers but not guardians, and currently not willing to volunteer). All first interviews with guardians were conducted in person between June and August 2011. Ultimately, interviews were conducted with nine active, and two inactive volunteers. Three second interviews with respondents from the first round of interviews were conducted by phone

between February and March 2012 to further elaborate on themes that arose from the first wave of guardian interview data, as well as to provide member checking, a critical component of trustworthiness in qualitative research (Padgett, 2008).

Interviews conducted with stakeholders included three interviews with current and previous board members and three interviews with current and previous staff members. These interviews occurred after the completion of data collection and analysis from the interviews with the volunteer guardians. Initial outreach occurred by email with an opt-out response. There were no opt outs. Using the Agency mailing list, sampling choices were made to include a representative number of men and women. Sampling for guardians ceased when an adequate amount of analyzed data revealed no new significant findings. Stakeholder sampling was based on convenience.

Interview Guides

For the volunteer guardians, the initial interview question requested that the guardians talk about their experience as a volunteer guardian, which permitted the guardians a great deal of latitude in responding as to why they chose this type of volunteerism, and how they approached the task. Follow-up questions probed the volunteers with regard to satisfactory and unsatisfactory aspects of the experience, as well as their perceptions of training and support. The stakeholder interview guide was developed following the collection and analysis of the initial round of guardian interviews.

The stakeholders were asked to elaborate on their own role with the agency, and their role in supporting the guardians. This permitted comparison of the guardian and

key stakeholder interview data relative to themes of importance, such as training and support and volunteer-client compatibility.

Data Analysis

Data were analyzed using the Generic Inductive Qualitative Model (GIQM: Hood, 2007), which permits the development of themes by using techniques noted as essential to grounded theory, including constant comparison across the interview data and thematic saturation, but does not assume theory development. The essential purpose is to permit a deep, interpretive analysis of themes, and is especially well-suited to nascent research with small samples. GIQM requires the earliest possible data analysis (Maxwell, 2007) in order to guide sample selection and interview guide development. This study was designed to collect and analyze data from two to three interviews at a time to permit early open coding and the development of a hierarchical coding structure.

Findings

Volunteer guardians must be prepared to assume responsibility for a wide variety of client issues. For many of them, both formal and informal training, in the form of support as needed, were very important. There were differences among the volunteer guardians, however, regarding how much training was needed. In comparing volunteer guardian interview data to demographic data, findings across some of the categories noted below were different for volunteers who identified as human service professionals (social workers, social service administrators, clergy) than for the volunteers who did not identify as human service professionals across several themes. These differences are

noted and reported vis-à-vis stakeholder data. Table 5 contains a grid of all thematic findings in relation to respondents by type.

Table 5

Thematic Findings by Respondent Type

Respondent Type	Theme				
	Formal Training & Ongoing Support	Training: Non-judgmentalness & Substituted Judgment	Training: VG to VG Support	A Good VG: Client Match	Recruitment of Other VGs
VGs <i>without</i> human service training	Sought training and support. Felt the need for specific case details before accepting the assignment	Verbalized need to advocate in a non-judgmental fashion. Actively demonstrated substituted judgment	Many would welcome the opportunity	Important to many of these guardians	Did not recruit. Did not generally talk about the experience in public
VGs <i>with</i> human service training	Often avoided training or expressed it had little value to them. Generally did not seek ongoing support. Did not generally need case details to accept assignment.	Verbalized need to advocate in a non-judgmental fashion. Actively demonstrated substituted judgment.	Did not express much interest.	Not at all important to these guardians.	Did not recruit. Did not generally talk about the experience in public.
Agency Board Members	Felt offering training was critical to recruitment.	Clearly expressed and emphasized both.	Did not express a need.	Expressed as an achievable ideal.	Verbalized that word of mouth recruiting

	Not aware of differences noted above.				was primary source of recruitment.
Agency Staff	Felt offering training was critical to recruitment. Not aware of differences noted above.	Clearly expressed and emphasized both.	Actively discouraged.	Seen as an ideal that was generally not practical or practicable.	Verbalized that word of mouth recruiting was primary source of recruitment.

Retention: Formal training and on-going support

A stakeholder knew from his professional experience that volunteer recruitment would be difficult without the assurance of support and training. He noted:

I believe at that point that we can find lots of people like [volunteer guardian] who generally want to give, who have...an innate sense of caring. But you just can't throw them out there, you have to support them. And I think if you can create a framework of support, I was convinced at that point I think we could have found other people. (13)

Thus, the respondent noted that the board of directors consists of professionals, including attorneys, physicians, clergy, nurses, social workers, and financial assistance experts, whose central purpose would be to support the volunteer guardians.

Some of the volunteers expressed an initial sense of lack of competence. For instance, the need for training and support seemed more important to several of the non-human service volunteers, who also reported a need to identify aspects of a client's case prior to accepting the assignment:

They said, she's gonna want to stay home, and that's going to mean a reverse mortgage. So, I knew what I was getting into, and I think that is very important - to know exactly what we are getting into, because wards are all over the spectrum. (1)

This promise of support and training was perceived as critical to recruiting volunteers who had no human service training. It was also predictive of a meta theme, 'how we do this' as reported previously (Jones, no date). Volunteers were even offered an opportunity to begin in an administrative position in order to help acclimate to the guardian task. Informal support and training were available at any time. One volunteer noted the need for informal support throughout.

If I needed help trying to figure out something financial, something legal, something with like a medical issue, I always had someone to talk to figure out some sort of issue. And it was, you know, just knowing that made it a lot easier, because, you know, it's a big responsibility. It's a huge weight taking on a guardianship knowing that you're going to be responsible - you know you are responsible for that person and their well-being. And, when you're new to it, you know, we don't really know the ins and outs. And, you don't want to not do right by that person. So, just knowing that those resources are there, and that they can always help you out... They would always present different training opportunities, and they actually practically reach out every month to kind of say, hey, how are things going with your ward - want to just check in, and that's actually really helpful that they do that... (2)

Human service volunteer guardians, however, tended to accept cases without inquiring as to the particulars of the case: "I tend as a personality to leap before I look" (3). "And I have a tendency to say 'Yes' to things before I really understand them" (12).

Moreover, some of the trained human services volunteers seemed to rely on what they described as their own professional training. "And that just probably comes through my own, you know, my background and what I do and I guess sort of what I believe" (9). This participant also noted, however, that she relied little on the support and training offered by the agency. "I really never had any guidance from the agency, believe it or not...But then again that comes from my background of what I do in my professional life" (9). Another human service volunteer who works with a younger client stated, "I treat Jane as I would treat one of my own children" (7). It should be noted that this

participant repeatedly reported her strong advocacy on behalf of her clients in terms of preserving her client's independence and rights, and that the sentiment expressed may simply be an artifact of the age of the client. However, this participant also noted:

I think they [the agency] initially thought I needed the support. Not knowing who I am, I guess that was a nice offer. They do have social workers available. They have doctors - I guess for guardians who have people in nursing homes, there's a lot of medical questions. So, they have medical personnel available to ask, and to seek information and input from. So that's why they hooked me up with them, and that was even before we were becoming nationally certified guardians - I mean, it was three years before. I tried to go up there for some of the activities for the classes, but 90% of what they do is during the day, and then, even then to travel up there - an hour up and an hour back - it's a big deal. I'm a busy woman. (7)

She later seemed to indicate some irritation with how the agency approached support and training. "If I need them, I'm not shy, but some of those volunteer coordinators are very into micromanaging, and so it's put me off a little bit about whether I would be involved with them." Another human service volunteer noted: "I don't know if there could be any training for this to be honest with you." "When the rubber hits the road, it was all on-the-job training." He elaborated: "I have enough confidence to figure out - I'm smart enough to eventually figure out what I need to do, and I'll do it" (3). Thus, the perception of the need for training and support may be different for guardians with human service training than it is for either their peers without a human service background or the stakeholders.

Retention: Formal training and on-going support – non-judgmental point of view. The agency provides on-going informal support around issues specific to each client, such as placement, hospitalization, financial management, legal ramifications. It also provides formal training and reinforces two important principles. First, training emphasizes that volunteers act without judgment toward the client or involved family/friends. This non-judgmental point of view may help to reduce the adversarial

nature and manage conflicts on a case. On the first case for a volunteer (1), two sons were present in the client's life. The volunteer was instructed by the agency to inform the sons of the court's decision but not to solicit their opinion, which may have invited their unsolicited participation. The volunteer reported this neutral stance helped her maintain a non-adversarial relationship with the sons on behalf of their mother.

And, from another volunteer who has had four clients over a more than 10 year history as a volunteer guardian with the agency, and approaches family with a non-judgmental point of view:

Then they realized that - they couldn't get anything because my ward had at the time no funds of her own, so nobody stepped forward to take the guardianship responsibility. But they all called me, and wanted to meet me to see who I was, because they thought it was somebody who was going to, going to [trails off]... interfere with the money. (2)

Several of the guardians intimidated that involved family seemed to have suspicious motives and that without the framework of a non-judgmental point of view, stressed by agency board and staff, the guardians may have been in a position to have to have 'chosen sides.' This was viewed as non-productive with regard to advocating on behalf of their clients. This training sub-theme resonated strongly with the guardians regardless of whether they had training as human service professionals or not.

Retention: Formal training and on-going support – substituted judgment.

Volunteers are trained to use 'substituted judgment,' that is to say volunteers are trained to act on behalf of their clients as they believe their clients would wish rather than what the volunteer may wish for themselves. This is considered critical in maintaining client autonomy, dignity, and rights. This training was clearly framed by all stakeholders:

But what's very important to me is substituted judgment. And we try to make decisions based not on what I think is right, but what they would have done had

they been able to do it. And that is lacking. Attorneys don't understand that and guardians don't understand that. They think, 'you're guardians, you call all the shots.' We do call all the shots, but...it's almost as if they become the parent to the child, and if the child never lived, as if the child doesn't have any experience. I said, 'These folks were competent all their life, and now you're taking them out of their homes.' 'Oh, because it's not safe anymore.' 'Well, what have you done to try to make the home safe?' (13)

This stakeholder participant further notes that caregivers frequently act upon what is convenient for them, something the agency stresses is not appropriate:

And there is nothing that burns me up than to hear a lady has \$300,000 in the bank, and you can't put grab bars in that house? You can't put a ramp up? You can't find 24-hour care? You're preserving her estate for what?...I want the debate over what kind of grab bars and what it's going to look like; not just put her in a nursing home. I want the debate over, 'is this a reasonable enough risk?' That's the question. Cause it's going to be risky to keep them home, but your job is not to make it riskless. Your job is to assume a reasonable risk. And reasonable minds will differ on what that is, and I'm happy to have that debate. (13)

The principle of substituted judgment is clearly stated by the guardians. "I am him. I *am* him..." (5). And another volunteer noted, "...they really were very clear in their training that when you do become a Guardian of someone, it's not your personal opinions and your own likes and dislikes. You are that person. And that was very empowering" (9). But, it is a process that seems to require teaching and reinforcement. One of the guardians clearly articulated what he perceived as a cognitive dissonance around substituted judgment:

The difficulty is that it's not necessarily something that's overly intuitive right up front. You've got to sort through all that. You can't just say, 'Okay, well I'm gonna do what I think he would want to do,' cause you don't know him well enough at first. And then you can only initially make judgment based on your experiences and wishes and likes and dislikes and everything....And so you end up making decisions that are contrary to your likes and dislikes and things like that, which becomes kind of hard to do sometimes. (5)

Retention: Formal training and on-going support – volunteer guardian to volunteer guardian support . Although some initial mentoring may occur, collaborative (volunteer to volunteer) training is not encouraged, although several volunteers suggested it might be helpful:

I actually asked - I suggested to her, the lady who does the trainings that maybe we should have a session where all of the volunteers - current and previous - come in and sit in a room, and we talk about the things that were challenging to us, and how we resolve them and everything. And she put that out to the volunteers and there was not a groundswell of enthusiasm to do it. (5)

The agency provides an opportunity for formal gatherings, mentoring, and the opportunity to attend board meetings, but is concerned about closer collaboration among the volunteers unless it is agency-sponsored lest the quality of the information not meet the agency's expectations. "...you would want to make sure the answer the volunteer got is right and conforms with what the agency would want" (16). Communication from volunteer to trained professional, usually via the board, was always encouraged, despite the fact that some of the volunteers are social workers, clergy, and social service administrators.

Retention: Matching Guardians and Clients

Finding a 'good fit,' that is to say, matching the volunteer to the task, and in this case the client, has been noted as an important best practice in assuring volunteer satisfaction and longevity (Flynn & Feldheim, 2003; Hager & Brudney, 2004a: 2004b). The agency sees matching a guardian with an appropriate client as key to volunteer satisfaction and retention. The board members expressed some vagueness about the matching process, however. "I think it's all a matter of the hand of God" (14). Agency

staff directly addressed this issue. However, this process still seemed to involve some sense of mysticism:

It's just bizarre, because I was told that there was something else at work, because there was always the right volunteer in place at the right time with the right case. It was odd... We'd get a volunteer who you could tell would really do better with the case where the person was institutionalized, already had all their needs met, maybe already on Medicaid, and that would be the volunteer who was next up on the list. Then, we get a case where the person was in the community, had been hoarding, had pets, and needed to be placed and put on Medicaid. And then there was this volunteer who was just chomping at the bit to have a big challenge in her life, and 'I have all this time in my life right now, I want to learn something new,' and there would be the right volunteer. (16)

Moreover, regarding well-considered volunteer-client matches, a staff member noted: "Well, a lot of times we don't have that luxury." She added: "...they might not have been the most perfect match, and it might not have been exactly what they wanted, but they are willing to serve, and we needed somebody and they were willing to do it" (18).

The non-human service volunteers seemed, at least initially, to place a premium on a compatible match:

So, they were really good at trying to pair me up with someone that, you know, I could make a time commitment to. So, originally they wanted to pair me up - it was cute -they wanted to pair me up with a little older lady I could talk to, or who would want someone to talk to, and I could just kinda hang out with. But, unfortunately, no one like that needed help at the time. (6)

This volunteer later expressed a growing compatibility with her client, an institutionalized older man with significant cognitive disabilities that precluded developing a bond around conversing. She noted an increasing sense of competence around working with institution staff and making medical decisions on behalf of her client, something that stemmed directly from her interface with the agency and the institution, which she found satisfying.

Occasionally, no clear bond forms between a volunteer, who may see that as important, and the client. When asked about whether she would be interested in working with a more verbal client, one volunteer noted:

I think that would have been more rewarding, more interesting, because now you're dealing with... Well, I'm going to say I assume you get to be more of a friend to somebody you can talk to, and of course, you're going to swap stories, and you know... (8)

And, when asked if she would accept another guardianship case, the volunteer stated:

I think I would, but I think I would know now what questions to ask, and I would think you know, maybe at this point I would want somebody that again I could build a rapport with, and, you know, where maybe - I guess it doesn't matter if they're in their home or not - were you could go visit them, spend a couple hours maybe, go for a drive or something like that. You know where I think you would feel like you are doing more good for the person, because maybe you are bringing that couple hours of happiness or something to them that they normally wouldn't get especially if they weren't home and nobody went to visit them or something like that. (8)

However, sometimes these matches needed to occur quickly without much consideration as to a satisfactory match, as a client was in urgent need of assistance.

Some volunteers did not express a need for an initial compatible match:

I kind of had an initiation by fire. There was not much training beforehand, because they needed someone pretty immediately, but the director was always there to answer any questions I had. It was their first experience and mine with someone who needed a reverse mortgage. (1)

And, from another volunteer:

I had not met him before I became his guardian - I didn't know that, that didn't seem to be necessary. I was accepting the situation, and I didn't want to be in any way predisposed by having met him. (5)

Many of the volunteers with human service training identified an interest in providing service to the clients despite full knowledge of the issues on the case, or the clients' inability to engage fully in a relationship. Working with an exceptionally

challenging client, one who also required assistance with a home sale and placement, one volunteer noted after working with the client for over a year, “I think that we’ve gotten a better relationship. Like he’s definitely, he’s not nasty to me for the most part.” She adds later in the interview, “So to have that conversation with him, there’s not a lot of give and take. It’s sort of like, ‘How are you?’ ‘I’m fine.’ ‘So, what’d you do yesterday?’ ‘I don’t remember.’ ‘What would you like to eat?’ ‘Pizza.’ It’s all the same rote sorts of conversation” (9). Another human service professional volunteer noted:

I’ve had so many emotional connections with so many other people, my clients, I don’t need an extra one....I mean my, I see my role as making sure she’s protected, making sure she’s taken care of, and making sure that nobody harms her or does anything to her that would hurt her in any way. And I think she’s in, like I say, I think this is a safe environment. (12)

Thus, again there are differences in perceptions of the need for a compatible match; volunteers with human service training seemed to be less in need of this than their peers. However, stakeholders seemed to have limited awareness of the importance of a match to some of the volunteers. Agency staff seemed more aware of this need in terms of satisfying their volunteers, but seemed hard-pressed by the reality of service demand to provide this.

Recruitment

Perhaps the most striking contrast between the volunteer perceptions and the stakeholders’ perceptions lie in their responses to inquiries about recruiting new volunteers. Staff comments about recruitment were similar: “Mostly I would say it’s through word of mouth” (18). Another stakeholder echoed this sentiment:

But I think a lot of it is word of mouth. We have a lot of people who bring a friend to us. I know they are really good in going out to the public and speaking either on the radio or clubs and such. They’ll go out and kind of describe what they do. (14)

However, across 15 interviews with 12 volunteers, none of the volunteers reported recruiting another volunteer for the task. When asked specifically, several noted that they did not often speak about this volunteer activity with others:

I don't try to share it with everyone. You know, if it comes up, you know, I will say, you know if it comes up with somebody close, but I don't go around telling everybody, I'm the guardian for somebody. If it comes up, or if it's applicable to the situation, I would share... When they hear that, usually people go *what* [heavy exclamation]? What do you do? (2)

They are more taken aback by it. They are like, we really didn't even know anything like that existed. It's just kind of so out of the norm. They think it's fantastic. They say, 'wow, that's a really great thing that you're doing.' That's generally what I hear. But it's always that - they're surprised that you would take on something that was such a heavy responsibility - you know being responsible for somebody's life. (11)

When asked specifically if board members recruit new volunteer guardians, one stakeholder noted:

Ah, they do; not as many as I'd like. I'd like to see more of them be diplomats in that respect for the agency and be a little more, you know. I'm not sure why I haven't seen more come from them. (13)

A second stakeholder intuitively noted something many volunteer professionals report: "There are a lot of people out there waiting to do something like this....They just have to be asked, okay" (14).

The staff and board recognize that community education may present the best opportunity to recruit new volunteers. The agency has engaged in educational activities onsite that are marketed to the general public, some of whom are interested in learning about the elements of guardianship because they have older adult family members and friends who need assistance. These educational initiatives are now being offered on a fee

basis to interested community members, who may feel more comfortable with the volunteer task post training.

Discussion

With regard to recruitment, deciding on a specific, professional recruitment strategy may be important. Flynn and Feldheim (2003) note that ‘concentric circle’ volunteer recruitment (word of mouth) is a method that relies upon volunteer recruitment by satisfied volunteers. However, this form of recruiting may not be the best choice with regard to matching perspective volunteers with the requirements of this task description, essential to optimal recruiting (Bradner, 1999, as noted in Flynn and Feldheim, 2003). Indeed, guardianship volunteers may best be recruited using targeted recruitment methods (i.e., recruiting around specific skills and talents), as opposed to ‘warm body’ or ‘word of mouth’ techniques.

Responses regarding recruitment offer obvious evidence of a challenge. Several stakeholders noted that volunteers and stakeholders stood to offer the best ‘word of mouth’ recruitment. Yet, across all interviews, no respondent had reported recruiting a new volunteer or board member. Of course, this does not mean that the Agency has not benefitted from this method of recruitment in its past. Yet, it is striking that several of the volunteers noted that they did not often speak of their experience as a volunteer guardian.

Research on volunteer management stresses training and volunteer development as critical to volunteer retention, especially in order to maintain interest in volunteering at that task (Bradner, 1999, and noted in Flynn & Feldheim, 2003), and may be critical in program risk management (Ott & Nelson, 2001). This study does not evaluate the

effectiveness of the training offered by the agency. However, as themes emerged that demonstrated a dichotomy between volunteer guardians who have been trained as human service professionals and those who had not, training may need to be provided differently to each group. As noted by the stakeholders, formal training and ongoing support (informal training) seemed to be an initial mandatory enticement to the non-human service volunteers, many of whom reported growing in the role over time and feeling less reliant on support.

Several of the human service volunteers, however, seemed to eschew the need for ongoing training or supervision. This finding was not noted in the stakeholder interviews. Although it may seem self-evident that human service professionals may feel they require less training and support, the Agency may assign the most complex cases to those with experience and training, possibly amplifying the need for sensitive supervision. Moreover, a seemingly idealistic picture of formal training and supervision seemed to emerge from the stakeholder interviews, as again there seemed to be limited sense of the perceptual differences between some of the volunteers and the stakeholders. Because legal guardianship exists at the nexus of medicine and the law, especially with regard to preserving the client's independence and rights and mitigating risk, supervision compatible with volunteer perceptions and expectations may be critical. Performance evaluation, reportedly an area of neglect in volunteer management as it may be perceived as criticism by the volunteer, may occur sporadically (Brudney, 1999). However, evaluation may be welcomed as a training tool, but needs to be offered sensitively and respectfully to guardians with human service training.

In their development of a longitudinal model of volunteerism, Haski-Leventhal and Bargal (2008) emphasize the importance of the organization, the client(s), and the volunteer's peers, to the successful socialization of any volunteer. The Agency does not engage in fostering volunteer to volunteer communication, except as a function of socialization. The Agency interviews did not indicate a sensitivity toward including peer to peer support, although several guardians expressed this interest. Using more experienced volunteers to assist in managing more junior volunteers, is cited as an effective management practice with regard to retention (Fisher and Cole as cited in Brudney, 1999; Haski-Leventhal & Bargal, 2008).

An appropriate volunteer to task (in this case client) match, viewed as another important best practice, was seen as an ideal among the key stakeholders interviewed (Flynn & Feldheim, 2003; Hager & Brudney, 2004). This perception of a satisfactory match may have been held in higher importance, especially among some guardians who do not have human service training. However, most of the guardians seemed to make the relationship work, even if they found satisfaction in the relationships they developed with institutional staff when an adequate client guardian bond could not be formed. However, as reported by Nelson and colleagues (2011), burgeoning relationships between volunteer ombudsmen and institution staff portended a diminution of the ombudman's advocacy role. This may appear almost as a form of 'regulatory capture,' the phenomenon that occurs when regulators begin to identify with those they regulate. Volunteer guardians without professional training, many of whom seem to have institutionalized clients, may be more prone to this phenomenon, and may become less effective advocates over time.

Limitations

With regard to limitations, it seemed apparent that a true picture of volunteer retention regarding this Agency is not known as the Agency itself does not keep summary statistics and seemed to accept at face value volunteers' reasons for declining a new assignment. Moreover, this sample was drawn from one agency. Therefore, results cannot be generalized to other agencies. It is also a limitation of this study that sampling was dictated by the information available on the Agency mailing list and that more former volunteer guardians were not interviewed. This would have provided a much deeper understanding of why these volunteers were not retained, and could have stood to inform Agency practices going further. This agency also expresses a mission and sponsors training reflective primarily of the legal issues regarding guardianship. Comparing these results to results gleaned from volunteer guardianship programs run by social service and faith-based organizations may offer very different points of view on training.

Implications

The agency operates with a part-time executive director and volunteer coordinator, positions that have experienced turnover. Grant funding is becoming increasingly precarious. In keeping with the agency's core values, it has developed a training institute to train not only its volunteers, but community members who wish to receive training on a fee basis for personal use, which may help to generate some funds for the agency, and serve as a conduit to recruit new guardians for the agency. Ultimately, resource allocation, in terms of paid staff to recruit, develop, and train, so critical to maintaining volunteer capacity as noted in the literature (Brudney, 1999; Hager & Brudney, 2004, Eisner, et al., 2009; Ellis, 1996), may not occur due to limited

agency financial resources. This may be the most significant predictor of the long-term growth and stability of this type of volunteer program.

In addition, there are many volunteer tasks that involve volunteer assignment to an individual client. Despite a rigorous search, most of the research relative to volunteer satisfaction employed a general construct of volunteer satisfaction. Research was not found that ‘drilled down’ to examine satisfaction with a client match, although it may be very important to many volunteers, especially volunteers who may work with only one client, such as hospice volunteers and volunteers in organizations, such as Big Brother and Big Sister and Court Appointed Special Advocates for children.

In terms of policy, it may be important to note that research findings descriptive of how and why people choose particular volunteer tasks may inform how we as a society apportion funds for government-sponsored volunteer efforts. Volunteerism in all its forms may be critical in terms of providing services to the growing number of older adults living in our communities. We can ill afford to provide state sponsored funding for older adults who may not meet the fullest requirements for admission into long-term care facilities. Providing an ‘ounce of prevention’ in terms of volunteer services in our communities may help to avoid premature, unnecessary, and costly institutionalization.

Chapter 4: Discussion and Integration of Findings

This chapter will integrate the results of this study in relation to the research questions: (a) What is the lived experience of volunteer guardians; (b) What brings them to this task (i.e., what are their reasons for volunteering as a guardian); (c) How do they see their role as volunteer guardians; and (d) How has the experience affected them. Quantitative results of the survey measure used in this study, the Volunteer Functions Inventory (VFI; Clary et al., 1998) are examined vis-à-vis the qualitative findings. Theory and most recent literature on motivation to volunteer are discussed. Finally, study limitations, strengths, and implications for policy, practice, and research are discussed at the conclusion of the chapter.

Summary of Results Related to the Research Questions

Due to an expected increase in the older adult demographic in the United States, its related increase in chronic illness including dementia, as well as an expected decrease in federal, state, local, and individual finances imposed in part by the 2008 recession, more Americans will be living longer, sicker, and in higher rates of poverty (NGA, 2010; Plassman et al., 2007). Older adults may benefit from services provided by volunteers in their communities. In 2010, American volunteers provided 8.1 billion hours of service with an associated economic value of \$173 billion dollars (CNCS 2010; 2011). Thus, volunteers are important to the service provider sector. There are certain volunteer tasks, such as guardianship, about which little is known. Understanding why volunteer

guardians chose and remain at this task is important to our understanding of recruitment and retention of future guardians.

The semi-structured interview guide used in this research was designed with broad questions to provide the respondents the opportunity to answer in any way they saw fit (Fetterman, 2010). Qualitative data analysis elicited rich themes descriptive of why guardians chose this complex and responsible task. The following overall themes seemed most descriptive of the task of volunteer guardianship.

Why I do this: Helping the unbefriended.

Despite differences in demographic data cross age, sex, and employment type, all of the guardians expressed a deep interest in assisting those in their community, and in society at large, who they perceived to be ignored, forgotten, marginalized, and often victimized. All of the volunteers interviewed reported a history of formal volunteerism, much of it related to community (including local government) activities. However, those who reported working at volunteer tasks aimed at providing service specifically to older adults in their community, such as Meals on Wheels, noted an increasing sensitization to the needs of older adults. Many of the guardians reported a sense of social isolation, increasing desperation and destitution among elders in their community.

The qualitative difference between this type of volunteerism and other forms of volunteerism may lie in the guardians' fervent expressions of interest in helping those they perceive no one else cares about. Their history of community volunteerism and this sensitization to a real problem in their community may have helped these volunteer guardians overcome any initial objections to working with older adults. Organizations with missions to serve clients with difficult problems may have issues recruiting and

retaining volunteers (Hager & Brudney, 2011). The nature of the problems faced by older adults requiring guardianship may not necessarily attract a large number of potential volunteers who have a wide number of other volunteer opportunities from which to choose. Many volunteers opt to work with children or animals. Several of the respondents in this study rued the preponderance of these volunteer opportunities, which they considered drew attention away from working with older adults. Moreover, their history of community volunteerism provided them with a bird's eye view of the plight of many older adults in their community. A history of volunteerism generally predicts continued volunteerism (Marx, 1999). Those who see the problem 'at ground level' in their community by virtue of their history of volunteerism may be more inclined to engage in attempting to improve their community.

This theme also seems to be the most relevant with regard to comparisons to the quantitative results of this research. On the values factor, volunteers from the comparison sample (Clary et al., 1998) scored a mean of 5.82 on the VFI. The study sample scored a mean of 6.28 ($p < .10$) on a measure with a Likert scale ranging from 1 to 7. Thus, it appears as though most volunteers are motivated to volunteer for humanitarian, altruistic reasons. The study sample, however, seemed even more so motivated. Their mean score on the values factor may have been capped by a ceiling effect. The qualitative results amplify the expressive depth of their desire to help those they perceive to be unbefriended.

As noted in Article 2, the results of this research indicate that volunteer guardians are motivated similarly to the comparison sample of volunteers, but to a greater extent than the comparison sample when the comparison sample scored above the median, and

to an even lesser extent on factors where the comparison sample scored below the median on the VFI. Thus, the comparison sample scored well above the median on the values factor, and the guardians scored above the comparison sample. The comparison sample scored below the median on the career factor, and the guardians again scored below the comparison sample. As noted previously, high values factor scores may predict an initial period of volunteerism, but the understanding and enhancement factors may predict continued volunteering (Finkelstein, 2008). The guardians scored relatively similarly to the comparison sample on the understanding factor. The second factor that may predict continued volunteerism, enhancement, is where the comparison sample and the guardians differed in scores on the VFI. Therefore, as ‘enhancement’ is recognized by the scale authors as a more egoistic factor, it may be important to note that volunteer guardians are less motivated to volunteer to enhance their self-esteem (Clary et al., 1998).

What’s in this for me: Giving back/paying forward, satisfaction and gratitude, learning skills.

The average age of this sample, 53.8 years, may also speak to a sense of an increasing need for these types of services as people see their relatives aging and as they, themselves, age. Respondents related personal stories of older family members who they could not help as well as they would have liked, generally due to geographic distance. Each of these respondents noted other individuals in their older adult relatives’ communities who ‘picked up the slack.’ Thus, volunteer guardianship became an opportunity to help someone else’s family member, or to help someone who had no family. Strikingly, one respondent who was 65 years of age noted that she may someday be in the same position as her guardian clients; that is to say, requiring the help of a

stranger in the community. This qualitative theme did not seem directly comparable to any of the VFI factors.

The same may be said of the qualitative data related to finding a sense of satisfaction in the work of the volunteer guardians. The guardians, however, were also not of a 'single mind' regarding the need for satisfaction or how they sought to feel satisfied in this task. The guardians scored significantly lower on the VFI factor titled enhancement. They were less often motivated by a need to feel better about themselves or deal with their sense of guilt over their good fortune. Clary and colleagues (1998) viewed this factor of the VFI as a more 'egoistic' factor, as opposed to a more 'altruistic' factor, such as the values factor. Using the scale authors' continuum, it might be said that volunteer guardians are even less motivated by self-interest than the comparison sample (Clary et al., 1998).

Article 1 reported that the guardians were motivated, however, to learn skills. Generally, they expressed this qualitatively in terms of learning how to navigate the system of care in the United States (e.g., Medicare, Medicaid, Social Security, county supportive services), so as to be of service to their parents or other older adults. The VFI includes a career factor, defined as learning new career skills or enhancing skills to support current employment. However, as noted in Article 2, the guardians scored significantly below the comparison sample mean on this factor. It is not clear whether this is a scale aberration or an actual difference. Indeed, in research on the VFI, Shye (2010) notes that the VFI factors may not necessarily be well-defined or comprehensive.

How We Do This

As reported in Article 1, qualitative themes related to how the volunteer guardians performed their task, specifically related to dealing with conflict and solving problems, a need for affiliation, and asking for help and seeking training, were compared to the demographic information collected from the interviews. The guardians' performance tended to fall along the line of a continuum: guardians with human service training tended to be more assertive and directive, expressing less of a need for training or ongoing support. Guardians without human service training expressed a stronger need for training and supervision. They were able to verbalize that they did not feel skilled and relied on the agency staff and board members to help them solve problems and navigate the system. Several of them suggested that as they 'learned skills' to navigate the system, they felt less reliant on day to day supervision. Thus, some of guardians reported moving from a more functionary role to a more directive case manager role over time. Some of the guardians without human service training did not make this progression, however, and remained functionary guardians by their report. The role of functionary guardian may have a place in the continuum of the provision of a service, such as volunteer guardianship. Many clients requiring guardianship services are institutionalized. Therefore, little active case management may be required to effectively perform their duties as guardians. However, the qualitative finding indicative of those with human service training seeking help less often should be monitored closely to insure that volunteer guardians are performing their roles responsibly and ethically.

In terms of a need for affiliation, once again the guardians with human service training felt little need for it, expressing that their experience in working with clients

professionally allowed them to see their wards as clients and not as acquaintances or friends. The guardians without human service training may have been motivated somewhat differently, however. Some expressed a need to be matched with a client with whom they could have some sort of relationship. At times, the more experienced guardians in this group were able to find the relationships and feedback they wanted by joining with facility staff or agency staff. In working at an endeavor that is so singular (i.e., guardians work with one client), the importance of a good match should not be ignored or minimized. Best volunteer management practices (Flynn & Feldheim, 2003; Hager & Brudney, 2004) indicate that good role matches are critical to volunteer retention.

Qualitative Theme Comparisons: Guardians and Key Stakeholders

With regard to the need for formal training and on-going support, as noted above, the guardians mainly expressed their interest on a continuum that matched their professional backgrounds. Article 3 reported, however, that the key stakeholders did not make that distinction. All of the stakeholders felt as though a good training program and on-going support, specifically in the form of the human service professionals on the board of directors, had been critical to their success at recruiting new volunteer guardians. On-going formal training was offered on a scheduled basis, but guardians were not obligated to attend. A monthly phone call with each guardian was scheduled. Otherwise, the implied expectation on the part of the stakeholders seemed to be that guardians would call if they had a problem or question. However, the formal training seemed to successfully transmit the two most important pieces of information from the point of view of the key stakeholders: (1) the guardians seemed in the majority to view

their clients in a non-judgmental way, and (2) exercised substituted judgment (taking action based on what they perceive their client would want) in their work with their clients.

Some of the guardians expressed an interest in collaborating with other volunteer guardians. They thought they could learn from others who had navigated some of the areas new to them. End-of-life decision making was mentioned as ‘new territory’ by several of the volunteers, including those with human service training. Two of the guardians interviewed are members of the clergy with extensive experience working with families and clients who have had to make these decisions. The staff members, however, felt a need to control the stream of information. Seemingly, the concern was that guardians would learn how to do things incorrectly from other guardians, a cognitive distortion that did not seem evident to the stakeholders who expressed this opinion. Sponsored and monitored collaborations may be useful to guardian retention in terms of sharing skill sets and building a group bond.

In terms of the need for a good match (affiliation), the guardians’ qualitative results are discussed in terms of the continuum mentioned above. The board members, however, expressed the ideal would be to find the most appropriate guardian client match. However, the staff, who were on the frontline with regard to responding to the immediate needs for a guardian assignment, indicated that good matches were not always possible in practice. It is not known but of interest whether these quick matches have repercussions with regard to retention of guardians. It is not known, either, if there is a mechanism at this agency to change assignments if a guardian makes this request.

The qualitative comparison between guardians and key stakeholders on recruitment seemed unambiguous, however. The agency board and staff members noted that guardian and agency staff word of mouth recruitment was the primary recruitment technique. The guardians, to a respondent, noted that they had not recruited a new guardian. Indeed, several respondents noted that they were hesitant to discuss their volunteer activities in casual community settings for fear of not being understood.

Theory

Symbolic interactionism and identity theory.

As a macro theory of human behavior in society, symbolic interactionism may be too broad with regard to the analysis of results of this research. Maines (1977) notes a consistent criticism of ‘traditional’ symbolic interactionism as perhaps too vague or indeterminate. Blumer’s (1971, 1986) work, especially with regard to role, however, has informed a derivation of traditional symbolic interactionism. Structural interactionism (Serpe, 1987) and its embedded identity theory (Stryker, 1987, 2007; Stryker & Burke, 2000) proffers the notion that ‘self in society’ may be less fluid and open to interpretation than indicated by the theorists noted in Chapter 1. Stryker asserted that society offers some relatively stable and durable societal icons, including groups, organizations, and institutions, for example, and that we are embedded in an array of social constructs, such as age, race, ethnicity, social and religious class that further define our identities.

Although Stryker claims to share Mead’s perspective on self and society, he notes that “persons are seen as living their lives in relatively small and specialized networks of social relationships, through roles that support their participation in such networks” (p. 284). Identity theory specifically examines role choice (i.e., why we choose one role

over another) as situated in the context of internationalization of social roles. Multiple identities or roles develop along a personal hierarchy. Therefore, some roles are more important to a person than others. For example, a woman may identify more closely with the role of wife/mother; another woman more closely with a professional or occupation role. With a multiplicity of roles available, choosing the role of a volunteer may indicate a higher relative importance associated with that role.

Along with this internal role hierarchy, identity theory also posits that role internalization/salience also informs dimensions of interactional and affective commitment. Therefore, higher levels of interactional commitment, defined as the number of relational ties inherent in any role (e.g. wife who is a member of groups with her spouse), and/or more affective commitment described as that affect associated with any particular role, may predict role choice and role continuance (Serpe, 1987; Stryker, 2007; Stryker & Burke, 2000).

In this research, the qualitative theme 'helping the unbefriended' may be associated with affective commitment, in that volunteer guardians firmly asserted their interest in assisting those who had no other sources of support. Often, as reflected in the interview data, this assertion was noted strongly. However, it may be equally interesting to view these results through the lens of Blumer (1971), who viewed social problems as completely socially constructed and socially identified. Therefore, if a prospective volunteer 'sees' the social problem of unbefriended members of the community, he or she may be more inclined to volunteer as a guardian.

Grube and Piliavin (2000), using identity theory, and building upon the work of Callero (1985) sought to understand the volunteer role of blood donors within the context

of identity theory. In previous research conducted by Piliavin and Callero (1991), the authors reported that perceived expectations, especially with regard to expectations of others within one's social network, as well as society at large, contributed to role identity and predicted initial donations. Grube and Piliavin (2000) noted that volunteer activity, was predicted most strongly by role identity and previous volunteer experience. Because the authors root 'role identity' within the construct of perception of expectations of significant others, they indicate that this sense of the importance of the task as viewed through the eyes of others close to us, may reflect the work of Charles Cooley, an early proponent of the concept of 'the looking glass self.' Cooley, as reported in Scheff (2005), hypothesized that our sense of self may be driven in part by our perception of how we appear to others. Therefore, if volunteerism is perceived as important by those of significance to us, the role may be imbued with elements supportive of our positive view of self. In this research, volunteer guardians scored slightly higher than the larger sample on the 'social' factor (3.18 versus 2.59), which may permit the cautious interpretation that volunteer guardians are more aware of the positive perception of others regarding their specific volunteer role, and therefore, more invested in this role.

Finally, the qualitative findings 'giving back/paying forward' and 'learning to help,' which seemed to have no clear correlate among the quantitative factors, may be viewed through the perspective of a role theory, such as identity theory. Volunteer guardians in 'giving back/paying forward' may have been indicating that they are rehearsing for a role they anticipate, either for friends and family, or for themselves. Some of the guardians noted that they were learning skills to help others, perhaps indicating interest in and empathy for the roles other have in society.

Functional framework of motivation to volunteer.

A significant amount of research of volunteerism conducted through the late 1990's to present day has been produced by social psychologists, much of it based on the work of Clary, Snyder and their colleagues (Clary, et al., 1998, Clary & Snyder, 1991; 1999, Clary, Snyder & Ridge, 1992, Clary, Snyder, & Stukas, 1996, Omoto & Snyder, 1995). These authors used the functional framework of motivation to volunteer to help explain why people volunteer. Clary and Snyder (1999) stipulate that this framework focuses on the social processes that motivate people to initiate, that these motivations may be different for different people who have chosen the same volunteer task, that these motivations may or may not change over time, and that sustained volunteerism is dependent upon identifying and satisfying these motivations. Clary and colleagues (1991, 1995, 1998) developed the Volunteer Functions Inventory to measure these motivations.

The validity of the VFI has been confirmed in research conducted by Houle, Sagarin, and Kaplan (2005), who found volunteers differentiate among volunteer task choices based on their perception of how well the task will satisfy their motivation, and volunteers specifically chose tasks they perceive will meet their needs.

This research demonstrated that volunteer guardians are essentially motivated to volunteer for the same reasons (i.e., values) as many other volunteers, only more so. They scored higher (6.28 on a 1 to 7-point Likert scale) on this factor subscale than the larger sample (5.82). The qualitative results indicate the passion with which volunteer guardians seem motivated specifically to help people in their community whom the volunteers perceive to be at risk. It may be, however, that the guardians chose this

specific task, which is quite different from many other volunteer tasks, due to the singular nature of the task (i.e., it is not a group activity working together at the same time with other volunteers), and because of the community, civic engagement nature of the work. This may be a distinction with a difference with regard to the VFI results and this sample. Thus, they may have chosen this specific task for reasons in addition to the expression of altruism or humanitarianism (i.e., the values factor).

Volunteer guardians also seemed less motivated to volunteer for reasons related to their own self-interest, scoring significantly below the larger sample on the protective, enhancement, and career factors. It is not known whether differences between the scores for the larger sample versus the study sample are related to differences in the mean age of the samples. (Clary and colleagues reported a mean age of 40.9 [$SD = 13.38$] in their 1998 studies). The mean age for this sample is 53.8 years [$SD = 11.01$]). However, the high to low rank order of factors for the Clary study (1998) was values, understanding, enhancement, career, protective, and social. For this study, the rank high to low rank order was values, understanding, social, enhancement, protective, and career. The reverse rank order for the social and career factors may be a reflection of the different motivations of a middle-aged versus an older sample. There is some support for this finding. Greenslade and White (2005) in research using the VFI with an older sample (52.23 years; $SD = 18.14$) found their sample scored highest on the social factor, and describe this finding as related to the age of their sample. Moreover, research conducted with a sample of 4,085 international university students using a modified version of the VFI reported differences not only related to the age of respondents in the sample versus older samples reported above, but different factor structures based on cultural differences

(Hustinx et al., 2010). Thus, micro, such as age, as well as macro issues may influence volunteerism.

It is important to note that previous research on motivation to volunteer using samples of hospice volunteers (Black & Kovacs, 1996), and AIDs volunteers (Omoto & Snyder, 1995; Snyder & Omoto, 1992) produced results indicative of a different or ‘other-order’ factor structure on the VFI, as discussed in Chapter 1. Thus, two of the qualitative findings of this research may have an ambiguous or no relationship to the VFI factor structure. ‘Giving back/paying forward,’ may be related to the values factor, and ‘learning to help’ may or may not be related to the understanding factor. Further study would be required to determine if these are new factors or descriptive of existing factors. Both themes, however, seem to be motivators to volunteer among respondents in this study.

Review of Recent Literature on Motivation to Volunteer

More recent research reports continued work on motivation to volunteer and the Volunteer Functions Inventory, especially with regard to using its functional framework in combination with other theories, such as role identity, to further develop a longitudinal volunteer experience process. Finkelstein (2008) reported that the values motive was related to time spent volunteering to approximately the third month mark. However, the understanding and enhancement factors were the best predictors at 12 months. In linking the functional framework with the role identity theory to understand the ongoing volunteer experience, Finkelstein asserts that the understanding and enhancement factors more often predicted positive role identity as a volunteer. Finkelstein concludes that volunteers may be initially altruistically driven (values), but over the long term,

volunteers may continue more due to reasons more personally focused (i.e., enhancement and understanding).

Criticism regarding the VFI is noted in research by Shye (2010), who suggests the measure has a desirability bias; the measure actually infers some of the motives in the questions, which may prime the respondents. Indeed, this may be true. However, in this research, the qualitative data at times seem only indirectly comparable or incomparable with the VFI factor structure. For example, this study sample scored below the mean on the understanding factor, which is related to wanting to learn more about the world around them, and well below the mean on the career factor. Yet, many of the volunteers noted that they wished to ‘learn skills’ to help their families, neighbors, and friends. Shye also notes that some of the VFI factors may not be comprehensive definitions of their concepts. As previous research on intense, complex forms of volunteerism, such as hospice and AIDS volunteerism, have pointed to other factors present, perhaps the VFI could be refined, adapted, or updated to reflect the most recent research on motivation to volunteer. For example, two qualitative findings from this research, ‘giving back/paying forward,’ and ‘learning to help’ may or may not be related to the values and understanding factors respectively. In addition, the volunteer guardians reported an interest in ‘learning skills.’ in the qualitative results of this study. Yet, they scored lower on the career factor of the VFI (1.83, $p < .05$) than the comparison sample.

Study Strengths and Limitations

This study sought to add to our knowledge base regarding volunteerism by collecting qualitative and quantitative data from volunteer guardian respondents and comparing the results of the quantitative data to data collected from a larger study sample

upon whom the VFI was validated (Clary et al., 1998). Thus, because volunteer guardianship had not been studied previously, the guardians had an opportunity to directly address research questions, but their quantitative data offered a chance to make a comparison to a larger group of volunteers engaged in a wide variety of volunteer activities.

Each of the three articles included in Chapter 3 note individual limitations. However, in summary it is important to note that 75% of the respondents in this study were active volunteers. The absence of respondents from two categories ('no longer interested in volunteering,' and 'interested in volunteering but not as a guardian') limit the ability to draw more strong conclusions about volunteer guardians. Therefore, a wealth of information may exist on why people are no longer volunteering as guardians that make a more complete picture of this complex task.

In addition, the agency in question is a freestanding not-for-profit agency. Their only mission is to provide volunteer guardianship services. The agency's values are rooted in the law and not in social service or faith-based service ideals. Therefore, this agency may have a particular point of view and process that is not representative of other types of agencies. The agency is located in a small community in a mid-Atlantic state, and therefore its respondents may be quite different from those who would volunteer in more urban or rural communities.

As noted in Article 2 in Chapter 3, there are some limitations to the Volunteer Functions Inventory, specifically construct ambiguity, as noted by Shye (2010). It must also be said that there are limitations to using the Generic Inductive Qualitative Method (Hood, 2007). This research was not designed to construct theory, and therefore

grounded theory would not have been appropriate. It did require descriptive answers from respondents, however. To that end, GIQM served its purpose in permitting categorical saturation of several themes.

Sample size adequacy and post hoc analysis.

Prior to data collection, an a priori power analysis determined that a sample size of 12 would provide very good power at .93 to detect a difference of one standard deviation from the mean, and .79 to detect a .8 standard deviation from the mean. (Power calculator available at <http://www.stat.ubc.ca/~rollin/stats/ssize/n1.html>)

Psychometric information on the VFI includes means and standard deviation values for each of the six factors (Clary et al., 1998). The means for each factor from the Clary sample were compared to the means of each factor for the volunteer guardians using one-sample t-tests. Violations of assumptions of normalcy of data were tested using Kolmogorov-Smirnov Z tests. The results of the quantitative data analysis may be found in Chapter 3 (Article 2).

Implications

The following sections will discuss implications of this study with regard to social work practice, research, and policy.

Implications for practice.

The qualitative results of this study may inform practice with regard to recruitment and retention. Targeted recruitment of prospective volunteers who range from middle age to older adults could be matched with recruitment efforts aimed at giving voice to the stories of guardian clients reminiscent of relatives or even their own

future circumstances may solicit empathy and encourage increased volunteerism. Indeed, recruitment from community volunteer opportunities, that may be more consistent with the mission of community organizations and neighborhood associations, may prove fruitful. In addition, recruitment could be targeted to professional organizations, such as the National Association of Social Workers, professional nurses associations, and clerical associations. Civic organizations including local government volunteer activities (school boards, planning committees, etc.) could also be considered suitable for recruitment.

An important finding of this research, the continuum from active case manager to functionary guardian and its association with human service training was surprising and potentially impactful. Clearly, agencies may offer more satisfying volunteer experiences if they work toward understanding where their newly recruited volunteers fall on this continuum, and continue to check in with the volunteers for signs of growth. The conclusion that many of the volunteer guardians with human service training were less willing to be involved in formal training or supervision also has very important implications for practice, not just in terms of volunteer satisfaction but in terms of risk management and good client outcomes.

The same may be said for the theme regarding finding a good match between guardian and clients. If it is important to a guardian, agencies should acknowledge that and either have a mechanism to wait until an appropriate match is available, or have a process to change guardian/client assignments if necessary.

Agencies have different characteristics. Those with existing social service missions may have to strategize to develop a model of volunteer guardianship conducive to blending volunteers with existing service staff, who may be in a good position to act as

mentors, supervisors, and problem solvers. This may permit the recruitment of volunteers who are altruistically motivated but do not have human service training. Moreover, faith-based organizations may look to adapt a model of volunteer guardianship that relies upon either a partnership with an external social service agency or on the development of a ‘deep bench’ of problem solvers, such as financial asset managers, nurses and physicians, social workers, attorneys, etc. Many large congregations have ‘resident experts’ who could support the volunteer guardianship effort. Development of these models could occur through further research, including intervention research, with volunteer guardians.

Implications for research.

Clearly, the volunteer guardians were capable of working alone with one client, unlike many volunteer opportunities where communal activities are the focus. This could be explored as a salient characteristic of guardians using the framework of research on collectivism versus individualism among volunteers conducted by Finkelstein (2010). Moreover, Eagly’s (2009) work on gender differences and prosocial behavior, which concluded that men are more often engaged in agentic or individual prosocial activities, and that women were more interested in collectivist prosocial activities. This sample was predominantly female.

The qualitative finding ‘Giving Back/Paying Forward’ seemed to have no logical counterpart among the VFI factor structure. It is also curious that ‘learning skills,’ an important qualitative theme in this research may have seemed to link logically with the VFI career factor. Yet, the volunteer guardians did not score high on the career factor. Further development of the Volunteer Functions Inventory may sharpen its utility in

assisting agencies in developing fruitful volunteer guardian programs by incorporating some of the ‘other order’ factors from the research on AIDS volunteers (Omoto & Snyder, 1995; Snyder & Omoto, 1992), hospice research (Black & Kovacs, 1996), as well as the results of this study.

Indeed, a more complete picture of volunteer guardianship may come from a full case study to better explore the ‘black box’ nature of the agency at the center of this study. Follow-up research to examine relationships among volunteers, staff, and perhaps their clients might be illuminative as well. Such research might also employ a component to measure sense of competence with the task or skill level at the task among the volunteer guardians. This research might better flesh out the finding related to the differences between the human service-trained professionals and the other volunteer guardians as noted in Article 1 in Chapter 3.

As alluded to in all three articles, volunteer guardians seem motivated to volunteer in service to their communities. Many had engaged in community volunteer opportunities previously, such as volunteering on school boards, or local government committees. It may be important to appreciate whether the volunteers perceive this task as civic engagement rather than traditional volunteerism (hospital/healthcare tasks, for example).

Finally, choosing to volunteer may be viewed as a choice to assume a role. As such, there are several role theories which are explored in work by Brooks, Davidson, Daly, and Halcomb (2007) that may better help to understand why volunteer guardians choose this particular volunteer task.

Implications for policy.

The United States invests taxpayer funds in assisting older adults (CMS, 2009). Some of this funding goes to community resources (Teaster, Wood, Lawrence, & Schmidt, 2007; Teaster et al., 2005). Much of this funding, in the form of Medicaid, pays for older adults to reside in institutions (Smith et al., 2009). Cost of institutionalization and the absence of sufficient bed space may limit choices. Over the past decade, some funding has begun to shift to providing more supportive services to older adults in the community in order to avoid institutionalization. Diversionary funding, as it is known, has been shown to be less costly than institutional care. The community may also be the most appropriate and most humane place for older adults. Seeking the most appropriate resources for older adults must continue to influence the development of policy. New volunteer programs may aid in this effort.

The United States also invests taxpayer funds in the development and operation of formal volunteer programs, much of it housed in the Corporation for National and Community Service (CNCS), which sponsors formal volunteer, service opportunities, and civic engagement programs, such as AmeriCorps, Senior Corps, and Learn and Serve America. Civic engagement offers promise in terms of re-energizing a sense of community that may have become less important over the past few decades in the United States. Many small programs, such as the agency program noted in this research, could be aggregated under the umbrella of a national policy center, such as CNCS, so that these volunteer programs are known and available to communities nationwide.

Conclusion

This study offered a unique opportunity to study a complex volunteer task, volunteer guardianship, that may become increasingly important as our older adult population grows. Perhaps one of the most salient issues, however, is the lack of progress that had been made in understanding guardianship and guardianship programs. As noted in Chapter 1, there are a variety of different program models (social service, faith-based, etc.) that operate to varying degrees of success under the rubric of different state laws (Teaster, Wood, Schmidt, & Lawrence, 2008). There seems to be little uniformity. As noted by Fell in 1994, the American Bar Association had been suggesting as far back as 1979 that the United States might benefit from a model guardianship statute. We seem to have made little or no progress toward this goal.

Hopefully, understanding that there are citizens who wish to be engaged in community activities may inform our need as a society to deploy these people by providing them the opportunity to serve. This research may help us understand why citizens choose to become volunteer guardians and how they accomplish this very worthy task. Volunteerism of this type serves to strengthen our communities.

Appendix A: Interview Guide Questions and Probes

Question 1: Tell me about your experience as a volunteer guardian.

Probes:

How did you get started? How did you find out about the agency? Who told you? Did someone you know also volunteer for the agency?

What was 'getting started' like? How did you feel about getting your first assignment? What was that first day like?

What is your day-to-day experience like as a volunteer guardian? Has the experience changed over time? How? What keeps you involved in volunteering as a guardian?

Question 2: Please tell me about a difficult case or situation?

Probes:

What in particular made this difficult? How were you able to overcome this difficulty? Who was helpful in overcoming this difficulty? Did you feel you learned something important by dealing with this difficulty?

Question 3: Please tell me about a case or situation you found satisfying?

Probes:

What in particular made this satisfying? Why?

Question 4: What led you to become a volunteer guardian?

Probes: What specifically about your experience informs your volunteer task? How well did this experience prepare you to be a volunteer guardian?

Probes: How did this experience affect your confidence that you could do this task? Did you feel this experience might be helpful when you started volunteering as a guardian? Why?

Question 5: What things help you be a volunteer guardian?

Probes: How has training helped? Tell me a little about the training process? What parts of training specifically did you find helpful? What others training

would you suggest? How are you supervised? Tell me little about the supervision process. How would you change the supervision/process?

Probes: How do you feel your family and/or friends help you? How do you feel they may hold you back? Do others in your immediate circle also volunteer? As guardians? What sort of effect does this have on you?

Question 6: How has this experience affected you?

Probes:

How has it affected your day-to-day life? Your relationships with family/friends? How has it affected your physical and/or emotional health? Do you feel you benefit from this experience? How? (If you don't benefit, could you tell me why you continue to volunteer.) Do you talk with others about this experience? With whom do you talk? Do you find this helpful? ('individual effects')

Do you feel society benefits from your volunteerism? How? What does being a volunteer guardian mean to you? ('higher order effects')

Question :7 Is there anything else you would like to tell me about being a volunteer guardian?

Note. Clary, E., Snyder, M., Ridge, R., Copeland, J., Stukas, A., Haugen, J., & Miene, P. (1998). Understanding and assessing the motivations of volunteers: A functional approach. *Journal of Personality and Social Psychology*, 74(6), 1516-1530.

Appendix C: Volunteer Functions Inventory Follow-Up (Outcomes)

Volunteerism Questionnaire

ID# _____

Using the 7-point scale below, please indicate the amount of agreement or disagreement you personally feel with each statement. Please be as accurate and honest as possible, so we can better understand this organization.

Strongly Disagree 1 2 3 4 5 6 7 Strongly Agree

Rating

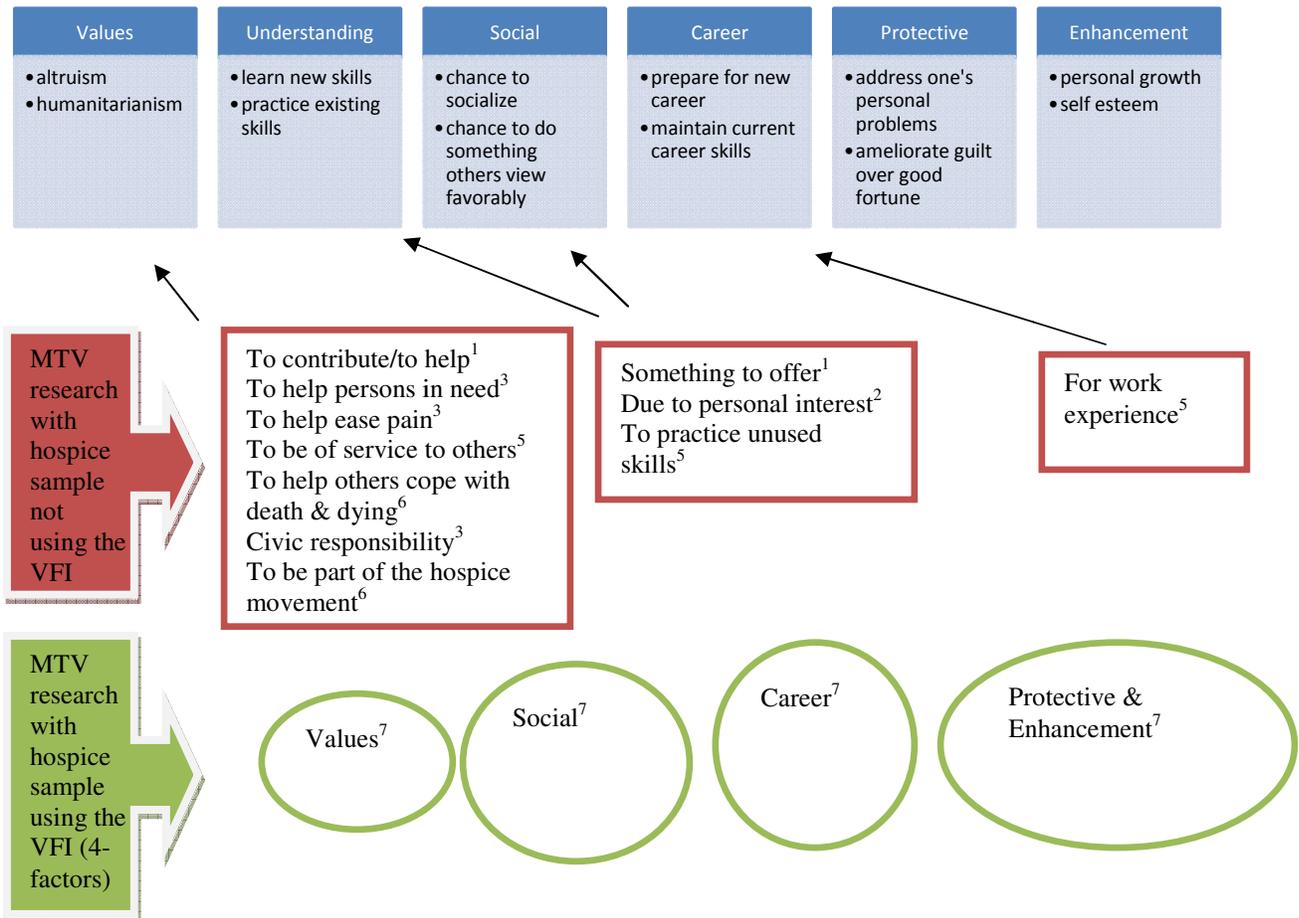
- _____ 31. In volunteering with this organization, I made new contacts that might help my business or career.
- _____ 32. People I know best know that I am volunteering at this organization.
- _____ 33. People I am genuinely concerned about are being helped through my volunteer work at this organization.
- _____ 34. From volunteering at this organization, I feel better about myself.
- _____ 35. Volunteering at this organization allows me the opportunity to escape some of my own troubles.
- _____ 36. I have learned how to deal with a greater variety of people through volunteering at this organization.
- _____ 37. As a volunteer in this organization, I have been able to explore possible career options.
- _____ 38. My friends found out that I am volunteering at this organization.
- _____ 39. Through volunteering here, I am doing something for a cause that I believe in.
- _____ 40. My self-esteem is enhanced by performing volunteer work in this organization.
- _____ 41. By volunteering at this organization, I have been able to work through some of my own personal problems.
- _____ 42. I have been able to learn more about the cause for which I am working by volunteering with this organization.
- _____ 43. I am enjoying my volunteer experience.
- _____ 44. My volunteer experience has been personally fulfilling.
- _____ 45. This experience of volunteering with this organization has been a worthwhile one.
- _____ 46. I have been able to make an important contribution by volunteering at this organization.
- _____ 47. I have accomplished a great deal of "good" through my volunteer work at this organization.
- _____ 48. One year from now, will you be (please circle your best guess as of today):
- A. volunteering at this organization
- B. volunteering at another organization
-

C. not volunteering at all

Note. Clary, E., Snyder, M., Ridge, R., Copeland, J., Stukas, A., Haugen, J., & Miene, P. (1998). Understanding and assessing the motivations of volunteers: A functional approach. *Journal of Personality and Social Psychology*, 74(6), 1516-1530.

Appendix D: Construct Diagram

Altruistic ↔ Egoistic
Volunteers Functions Inventory:



¹ Murrant and Strathdee (1995); ² Scott and Caldwell (1996); ³ Black and Kovacs (1996); ⁴ Black and Kovacs (1999);
⁵ Planalp and Trost (2009a);
⁶ Claxton-Oldfield, S. and Claxton-Oldfield, J. (2007); ⁷ Planalp and Trost (2009b)

Appendix E: Board Members Interview Guide

(If by phone): Would it be okay to audio tape this interview? (If yes, start tape recorder and say, “Would you mind confirming that it is okay to audio tape this interview?”)

Question 1: Please tell me about how you came to your position?

Probes: Do you have experience as a volunteer? Do you have experience with guardianship? Do you/have you served on other not-for-profit boards? Do you have professional experience that informs you position on the board?

Question 2: Tell me about your role in supporting the Agency?

Probe: How do you see you role as a board member in helping the Agency operate?

Question 3: Tell me about your role in supporting the volunteer guardians?

Probes: Do you have direct contact with the guardians? If yes, how do you feel about this level of contact? Do you feel it is an important part of your role as a board member to have direct contact with the volunteers?

Question 4: What is your vision for the Agency going forward?

Question 5: Is there anything else you would like to tell me about your experience as a board member?

Appendix F: Staff Member Interview Guide

(If by phone): Would it be okay to audio tape this interview? (If yes, start tape recorder and say, “Would you mind confirming that it is okay to audio tape this interview?”)

Question 1: Please tell me how you came to be the (title) of the agency?

Probes: Do you have experience as a volunteer? With volunteer organizations? With guardianship? How do you feel about this experience so far? If you’re no longer with the agency, why did you leave?

Question 2: Please tell me about how the agency finds prospective volunteer guardians?

Probes: Is there a formal procedure for recruiting? Is there a vetting process? Have you found that some people may not be appropriate for this task, and if so, how do you deal with the situation?

Question 3: How does the agency train/prepare the volunteers?

Probes: Is there a specific training process prior to assignment? Please describe this process? Is there a specific process to ongoing volunteer training? Please describe this process? How do you prepare/work with volunteers around their affiliation with their ward? How do you prepare volunteers to interface with the Agency’s Board members?

Question 4: How do you assign volunteers to work with wards?

Probes: Tell me how cases are accepted by the Agency? Tell me about how important the expressed wishes and the characteristics of the volunteers are in the process of assignment? How important are the case facts important in assignment? How is volunteer withdrawal/dissatisfaction handled?

Question 5: How do you support the volunteers?

Probes: Please describe the mechanisms in place to help volunteers solve problems on behalf of their wards? Please describe how you support the volunteers in general? Please tell me how you handled a difficult situation or ethical dilemma?

Question 6: Is there anything else you would like to tell me about your role with the agency?

Appendix G: Volunteer Guardian Second Interview Guide

(If interviewed by phone): Would it be okay to audio tape this interview? (If yes, start tape recorder and say, “Would you mind confirming that it is okay to audio tape this interview?”)

Thanks for giving me some time to check back in with you. Now that I’ve completed a number of interviews with volunteer guardians, there are things I’d like to follow-up on.

Question 1: Interviewer will review summary of first interview and ask respondent for his/her reaction.

Probes: Is this summary correct? Does it adequately reflect the interview? Are there things that were not emphasized enough or that were overemphasized?

Question 2: Interviewer will ask respondent for further information on areas identified for (a) clarity, (b) further exploration, (c) difference from other respondents based on review of first interview (specific to each respondent).

Question 3: Tell me how you feel about the importance of having *an emotional connection* (use language to describe ‘emotional connection’ as respondent used in previous interview) with your ward? (May need to brief define ‘emotional connection’ or remind respondent of context in previous interview.)

If you have not/had not made an emotional connection with your ward, how do you think that affected your work with your ward?

Several guardians told me they had forged relationships with staff at agencies and institutions on behalf of their wards. Please tell me how you feel about the importance of having a connection with other volunteer guardians, agency staff, and/or others involved (facility staff, country officials, etc.)?

Question 4: Would you tell me a little more about a situation you found difficult or troubling. *(If it is appropriate to ask this question of the respondent, the interviewer will probe with situation described in previous interview.)*

Probes: How did this situation affect your relationship with your ward? How did this situation affect your relationship with your family?

Question 5: If things were difficult in your personal life, how did you volunteer work affect this?

Question 6: Please elaborate a little more on why you do this (volunteer guardianship)?

Question 7: Is there anything you would like to add?

Appendix H: Informed Consent Document

RESEARCH CONSENT FORM

Protocol Title: The Work of Volunteer Guardians: Exploring Motivation to Volunteer

Study No.: HP-00048855

Principal Investigators: Donna Harrington, PhD (410-706-3136) and Andrea L. Jones, MSW, LSW (610-256-8183)

This research study is being conducted in order to better understand why people volunteer to serve as guardians for older adults. Your participation is voluntary, and you may ask questions about this study or discontinue your participation at any time.

PURPOSE OF STUDY

As noted, this study will help us better understand what motivates people to volunteer as guardians, why people continue in this position, and what types of training and support volunteer guardians say they need. You are being asked to participate in our research, because you are currently or have recently been a volunteer guardian. Because we are in the early stages of collecting data on this important but understudied group of volunteers, we are seeking only about 8-30 volunteers from one volunteer guardian agency initially.

PROCEDURES

We will be asking you to answer several questions about your volunteer role. (For example, what are your thoughts about the training you have received and the training you will need to do the best job you can.) The interviews should take about 60 to 90 minutes and will be audio-taped. We will also ask you to answer two brief surveys about volunteerism, as well as some questions about you, specifically your volunteer and career experience, your age, length of your volunteer experience as a guardian, etc.

All participants will be interviewed once, and some or all may be asked to complete a second interview to help us better understand the information collected in the first interview. It is also possible that if we still have unanswered questions after completing second interviews with some or all participants that we may ask to interview you a third time. If needed, we anticipate that second or third interviews will take no more than 60 to 90 minutes and will be completed within one year of the first interview.

POTENTIAL RISKS/DISCOMFORTS

There is a slight risk of loss of privacy or confidentiality due to participation in this study; however we will make every effort to protect your privacy and confidentiality. To protect your privacy we will ask to interview you in a private location.

POTENTIAL BENEFITS

You may not benefit directly from your participation in this study. However, the results of our research may provide valuable information about training you think would be helpful to people who may be in a position to implement that training, including the volunteer organization, the social service agencies and organizations with which you partner, or a training organization. In addition, the information you provide about why you volunteer as a guardian may help others understand how to recruit, train, and retain other volunteer guardians.

ALTERNATIVES TO PARTICIPATION

This is not a treatment study. Your alternative is to not take part. If you choose not to take part, your decision will only be known to this research team. Your choice not to participate will not affect you in any way.

COSTS TO PARTICIPANTS

It will not cost you anything to take part in this study.

PAYMENT TO PARTICIPANTS

You will not be paid to participate in this study.

CONFIDENTIALITY

We will not record any identifying information, such as your name, address, or phone number, on our documents. Your completed surveys will have an identification number rather than your name on them. Your audio-taped interviews will be stored following transcription in a locked file cabinet. Your transcribed interviews will be entered into a computer program that searches for common themes among interview responses. These themes are then coded. We want to understand broad and general patterns regarding motivation to volunteer as a guardian. So, the information you supply to us will be blended with information supplied by other participants. Audio tapes and transcripts will be secured for approximately five years, after which time they will be destroyed.

The information from this study may be published. However, you will not be identified by name. People designated from the institutions where the study is being conducted will be allowed to inspect sections of your records related to this study. Everyone using study information will work to keep your personal information confidential. Your personal information will not be given out unless required by law.

It is important to note that the researchers will not need to know the first and last names of your clients. However, it is difficult to answer questions in interviews at times without referring to someone by name. Therefore, we will remind you during the interview just to use the first name of your clients, as well as organization staff. It is also important to note that suspected abuse and/or neglect of agency clients will need to be reported to the appropriate authorities, and to the sponsoring volunteer guardianship agency.

RIGHT TO WITHDRAW

Your participation in this study is voluntary. You do not have to take part in this research. You are free to withdraw your consent at anytime. Refusal to take part or to stop taking part in the study will involve no penalty or loss of benefits to which you are otherwise entitled. If you decide to stop taking part, if you have questions, concerns, or complaints, or if you need to report a medical injury related to the research, please contact Andrea Jones at 609-815-8052. There are no adverse consequences (physical, social, economic, legal, or psychological) of a participant's decision to withdraw from the research.

UNIVERSITY STATEMENT CONCERNING RESEARCH RISKS

The University is committed to providing participants in its research all rights due them under State and federal law. You give up none of your legal rights by signing this consent form or by participating in the research project. Please call the Institutional Review Board (IRB) if you have questions about your rights as a research participant.

The research described in this consent form has been classified as minimal risk by the IRB of the University of Maryland, Baltimore (UMB). The IRB is a group of scientists, physicians, experts, and other persons. The IRB's membership includes persons who are not affiliated with UMB and persons who do not conduct research projects. The IRB's decision that the research is minimal risk does not mean that the research is risk-free. You are assuming risks of injury as a result of research participation, as discussed in the consent form.

If you are harmed as a result of the negligence of a researcher, you can make a claim for compensation. If you have questions, concerns, complaints, or believe you have been harmed through participation in this research study as a result of researcher negligence, you can contact members of the IRB or the staff of the Human Research Protections Office (HRPO) to ask questions, discuss problems or concerns, obtain information, or offer input about your rights as a research participant. The contact information for the IRB and the HRPO is:

University of Maryland School of Medicine
Human Research Protections Office
BioPark I
800 W. Baltimore Street, Suite 100
Baltimore, MD 21201
410-706-5037

Signing this consent form indicates that you have read this consent form (or have had it read to you), that your questions have been answered to your satisfaction, and that you voluntarily agree to participate in this research study. You will receive a copy of this signed consent form.

If you agree to participate in this study, please sign your name below.

Participant's Signature

Investigator's Signature

Date

Date

Appendix I: Demographic Questionnaire

DEMOGRAPHIC QUESTIONNAIRE

ID# _____

Year of birth _____ I currently volunteer at Volunteer Guardians

Gender (circle): F M _____ I have not volunteered for 3 months or more

Marital Status (circle): divorced married single widowed

Current Employment Status (please check one):

_____ working full-time outside of the home

_____ working part-time outside of the home

_____ homemaker

_____ unemployed

_____ retired

_____ disabled

_____ self-employed

Employment Category: If you are currently employed, or when you were employed, how would you describe what you do/did?

Volunteer History (formal volunteering):

_____ This is my first volunteer experience.

_____ I have volunteered before for other organizations.

Caregiver History (informal volunteering):

_____ I have spent time *in the past year* helping relatives, friends, or neighbors who did not pay me for my help (excluding raising your children).

_____ I have spent time *over the course of my life* helping relatives, friends, or neighbors who did not pay me for my help (excluding raising your children).

Appendix J: Codebook

Table of Project’s Conceptual Framework and Codebook

<p>Research Objective: To understand the experience of Volunteer Guardians</p>	<p>Possible Meta Codes in bold</p>	<p>Notes (from Atlas Code Mgr. w/ operational definitions)</p> <p><i>Added after additional pass through interviews using free codes in bold on left...</i></p>
<p>To understand how they came to the role of VG</p>	<ul style="list-style-type: none"> • How I began Intentional vs. unintentional Previous vol hx w/ OAs vs. previous vol hx vs. no vol hx Start-up process • Why I began (reasons for beginning) 	<p>07/29/2011 01:20:41 PM (HOW) How did vols come to find this task? What experiences as a vol or not as a vol preceded this experience (did they have specific experience as a volunteer, especially with older adults, did they have volunteer experience not much like this, did they have little/no vol experience)?</p> <p>Also look at fatalistic/serendipitous aspect of finding this task. Was it sought out or did they just bump into it?</p> <p>What was start-up like? What was the process? Was it what they expected? Not what they expected.</p> <p>07/29/2011 01:25:30 PM (WHY)</p> <p>Is there an expressed need to be of help/assistance? Is it specific to older adults?</p>
<p>To understand why they continue as VGs</p>	<p>Why I do this</p> <ul style="list-style-type: none"> • Affiliation (emotional connection) <i>Sought after experience</i> <i>Immediate</i> <i>Developed (“not what I</i> 	<p>07/29/2011 01:27:42 PM Will be the most expansive meta code: 1. Affiliation (emotional connection) a. this was a sought after experience</p>

	<p><i>thought”)</i> <i>Did not develop</i> Emotional connection w/other than ward</p> <ul style="list-style-type: none"> • Learning skills(for future) • Mentoring/a good example • Giving Back <i>In parallel</i> <i>In retrospect</i> • Protective of self (neg. affect/guilt) • Sense of Satisfaction • Expression of gratitude • Recognition <p>(italics indicate possible properties of larger code proposed for second coding)</p>	<p>b. this was immediately felt c. this developed over time d. this did not develop e. affiliation developed w/other than ward</p> <ol style="list-style-type: none"> 2. Valuable learning experience (future) 3. Mentoring/setting an example 4. Giving back <ol style="list-style-type: none"> a. In parallel (others are helping my loved ones currently) b. In retrospect (others had helped my loved ones) 5. Protective of self (against negative affect/guilt) 6. Sense of satisfaction
	<p><i>Consider adding a “How I Do This” meta code</i></p> <p><i>(How to move away from psych profiling)</i></p> <p><i>May ultimately need to develop a typology of ‘operational style’ (done 6/2012)</i></p> <ul style="list-style-type: none"> • Operational style • Dealing with conflict • Advocacy (added 8/2) • Asking for help • Training (useful/not useful, etc.) • Caregiving experience • Support from others (added 8/2) 	<p>07/29/2011 04:39:42 PM</p> <p>Pass through interviews to attempt to establish some free code organization. Many rich concepts aren't directly captured with three free codes (How I Began, Why I Began, Why I Do This), especially r/t how they do this. Need to consider adding an additional free code:</p> <p>"How I Do This" could capture: 1. 'operational style' (take charge/directive decision makers versus collaborative/need/wanting support), 2. how VGs deal with conflict, 3. how they ask for help/support, 4. whether they</p>

		<p>feel formal training is useful versus DIY/Learning on the Fly. These "styles" might inform how the agency interacts with the guardians and may influence retention and satisfaction.</p> <p>8/2/11 Added ‘advocacy’ to differentiate between dealing with family/staff conflict to reduce conflict, and addressing conflict in service of advocacy for ward. Also added ‘support from others’ to separate support from family and friends – will need further definition as support from other than family and friends began to blend in with interview #6.</p> <p>6/2012...”How I Do This” is derived from synthesis of codes in left column. As noted above, the respondents were not asked how they did this task. They answered the ‘grand tour’ opening IG question, “tell me about your experience as a volunteer guardian” by telling me about a case. This has developed into a typology of guardianship still with some correlation to demographics. Distinctions became even clearer with second interviews, but these interviews were all with ‘active case managers.’</p>
	<p><i>Added two more mega codes (6/2012)</i></p> <ul style="list-style-type: none"> • ‘UNBEFRIENDED’ 	<p>This code is used to describe horrible circumstances of client situations. Directly related to ‘why they do this.’ In vivo quotes will be helpful is</p>

	<ul style="list-style-type: none"> • 'AGENTIST' 	<p>illustrating the situations for readers.</p> <p>Describes the task as individualistic versus communal. Helps to portray accurately 'who they are' as volunteers (i.e., they are not volunteering at the PTA). Can compare/contrast to 'asking for help' which has implications around collaboration, and 'affiliation with other than ward' as a function of the volunteers need for emotional connection rather than just as a function of successfully getting the job done.</p>
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