

Enhancing Member Retention at the Rotary Club of West Shore in Victoria, BC

by

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**Abstract**

This organizational leadership project reflected on how the Rotary Club of West Shore (RCWS) in Victoria, BC can enhance current member retention efforts to support the achievement of its humanitarian mandate. The study employed an Action Research Engagement (Rowe et al., 2013) methodology with an appreciative stance to facilitate an inquiry into the current assets, individual experiences, and organizational processes that can be improved to ensure that members remain with the club long-term. A survey, four interviews, and a focus group were used to collect qualitative data relevant to the inquiry. Participants shared their experiences with the club, commented on the current state of their membership and individual needs, and dreamt about the future of RCWS with a strong diverse membership that would only amplify its capacity to serve both locally and internationally. The study was conducted with adherence to the Royal Roads University *Research Ethics Policy*.

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## **Chapter One: Focus and Framing**

The Rotary Club of West Shore (RCWS), located in Victoria, British Columbia, is a non-profit organization comprised of volunteers. Its sole purpose lies in offering service to others, promoting personal and professional integrity, advancing appreciation for human diversity, establishing goodwill in relationships, and striving to achieve peace ("Strategic plan", n.d.). Members are usually local community leaders, both working and retired professionals, who join the club to encounter like-minded individuals invested in transforming communities both locally and internationally. The opportunity to be in fellowship with other members of the club is foundational for building internal cohesion, which is then translated into humanitarian efforts and fundraising initiatives in support of service projects ("Strategic plan", n.d.).

While the strategic mandate is shared by all clubs affiliated with Rotary International and "evolves with the aspirations of Rotarians" ("Strategic plan", n.d.), each individual Rotary club contextualizes its efforts to advance its local community in addition to supporting international projects. Such two-fold, service-oriented focus is depicted in the motto adopted by RCWS, which states its commitment to "helping near, helping far" ("What we do", n.d.). On the local level, the club has devoted itself to promotion of literacy through purchase of books for pre-school and First Nations children. Additionally, the club sponsored the anti-bullying campaign in local schools, funded the community food bank's hamper program, and supported the Salvation Army's community outreach efforts. On the international level, the club members raised funds to help build a high school in Malawi, two school water wells in Malawi and Uganda, and offer financial support for a Mother's education program in Bangladesh and disaster relief efforts in the Philippines.

The nature and scope of the aforementioned service projects demonstrate Rotary's direct dependence on its volunteer members who apply their "leadership and expertise to solve social issues" ("Strategic plan", n.d.). Volunteer leaders and members collectively use their professional knowledge and creativity to plan and execute fundraising initiatives that make sponsorship of various humanitarian projects possible. According to the club's secretary, RCWS currently has 23 members, but the turnover of members has been significant (S. Triplett, personal communication<sup>1</sup>, August 26, 2016). Of special importance to RCWS is the issue of member retention that is instrumental for advancing the club's involvement in local and international humanitarian projects (T. Sutherland, personal communication, June 10, 2016).

I have a dual role in this project, because I am internal to the organization as well as serving as the researcher in this thesis project. I have been a member of RCWS since August of 2011. In the summer of 2013, I joined the executive board of the club and served as an external service lead for two years, receiving and processing requests for funding. In the summer of 2015, I accepted the nomination to serve as the club's treasurer, extending my commitment to the club's executive board. In my current role, I am responsible for basic financial account maintenance, budget planning, and working with club committees to ensure that their expenses are within budget. As an insider who possesses internal familiarity with the organization, it will be imperative that I function as "a facilitator" (Stringer, 2014, p. 20) of the inquiry process rather than as a biased expert. To that end, it will be my responsibility to ensure that my observations of conversations occurring within the social system and my sense-making practices are open to external critique from stakeholders within the system (Coghlan & Brannick, 2014, p. 37).

In order to address the issue of concern to RCWS, the following inquiry question has been formulated: How might engaging the stakeholders of the Rotary Club of West Shore

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<sup>1</sup>All personal communications in this report are used with permission.

(RCWS) enhance member retention? The sub-questions that will inform the overarching inquiry process are:

- 1) What are the factors that influence membership attraction and retention for RCWS?
- 2) What member retention efforts currently exist at RCWS and are they effective? If so, how could these be strengthened and augmented?
- 3) What are the barriers to member retention at RCWS and how can these be reduced?
- 4) What other membership retention strategies can be implemented and who needs to be involved?

### **Significance of the Inquiry**

The current strategic plan assumed by Rotary International identifies recruitment and retention of new members as a goal for strengthening existing clubs ("Strategic plan", n.d.). In that sense, the inquiry into enhancement of member retention at RCWS aligns with the greater organizational orientation. Rotary's aspiration with respect to membership lies in careful representation of the area demographics in the categories of age, gender and culture (Manual of Procedure, 2013, p. 8). Diversified membership contingent is an important area of focus for each Rotary club because it allows the club to utilize the members' professional expertise and creativity in the search of solutions to existing social issues (Manual of Procedure, 2013, p. 8). Therefore, there is a direct correlation between the existing membership contingent and the kind of service projects that RCWS can undertake in the community (T. Sutherland, personal communication, June 10, 2016).

The ultimate goal for RCWS, as articulated by Teresa Sutherland, the past president of the club and the Project Sponsor, is to "retain members to help facilitate the necessary learning about Rotary, so that people can discover ways to apply their skills within the club" (personal

communication, June 10, 2016). Enhanced member retention at RCWS, therefore, affects individuals' awareness of the organization and its mandate. Subsequently, proper contextualization of individual skills and expertise within RCWS, which results from improved familiarity with the organization, can help shape the club's identity and develop an awareness of potential avenues for "service above self" both locally and internationally.

Key stakeholders impacted by this particular inquiry are the RCWS prospective and current members, as well as the beneficiaries of the club's service. In the event that the inquiry into enhancement of member retention at RCWS is not undertaken, a number of negative effects can be anticipated. Failure to decipher what attracts prospective members and makes them stay can result in a membership decline, as current members may experience burn-out from carrying out a set of responsibilities over a prolonged period of time without an opportunity to rotate out of a leadership role (T. Sutherland, personal communication, June 10, 2016). In addition, inability to retain a diverse membership contingent can dull the club's creativity and stagnate its development, which would ultimately make RCWS less efficient in offering tangible service to beneficiaries.

### **Organizational Context**

Located in the west shore of Victoria, British Columbia, RCWS is a service-oriented organization that is driven entirely by 23 volunteer members. All Rotary clubs possess membership with Rotary International and are mandated to adopt the *Standard Rotary Club Constitution* in order to have the right to represent the organization (Manual of Procedure, 2013, p. 3). Therefore, while individual clubs are autonomous structures, they adopt the mission, the strategic plan and values of Rotary International, but reserve the freedom to fulfill those in ways that are contextually relevant (D. Stocks, personal communication, May 11, 2016). As such,

RCWS is a member of Rotary International District 5020 comprised of 88 clubs that are located in British Columbia and the State of Washington (D. Stocks, personal communication, May 11, 2016).

Of 23 current members at RCWS, seven members make up the executive board, which is tasked with providing administrative leadership. The roles on the executive board are the following: president, president elect, treasurer, secretary, past president, Rotary foundation lead, fundraising lead, external service lead, and sergeant at arms ("Club information", n.d.). Each position on the executive board is a one-year commitment. The club members nominate potential candidates for each position and individuals have the opportunity either to accept or decline the nomination. Such an administrative approach is reflective of the "rotating leadership" (Davis & Eisenhardt, 2011) model, which strives to limit competition and cultivate utilization of various aptitudes represented in the group in ways most beneficial to the mission of the club (Davis & Eisenhardt, 2011, p. 162).

As a member of Rotary International, RCWS abides by the following mission statement, "We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders" ("Strategic plan", n.d.). In addition, RCWS shares the core values professed by Rotary International, which "drive the intent and direction of the organization's leadership" ("Strategic plan", n.d.).

The following statement about the core values of Rotary is issued on the website:

Our values are an increasingly important component in strategic planning because they drive the intent and direction of the organization's leadership. These core values are:  
Fellowship and global understanding: we build lifelong relationships; Ethics and integrity: we honor our commitments; Diversity: we connect diverse perspectives;

Vocational expertise, service, and leadership: we apply our leadership and expertise to solve social issues ("Strategic plan", n.d.).

In 2010, Rotary International identified three strategic priorities for its clubs, focusing specifically on strengthening clubs, increasing humanitarian service, and enhancing public image and awareness ("Strategic plan", n.d.). The purpose of the three-fold plan is to ensure that Rotary remains "known as a respected, dynamic organization that advances communities worldwide" ("Strategic plan", n.d.).

As evidenced above, the strategic plan of Rotary International is concerned with cultivating a forward momentum within the organization and maintaining an appealing external image. The inquiry into enhancement of membership retention at RCWS aligns with the organization's emphasis on strengthening clubs and promoting membership diversity. Teresa Sutherland, the club's past president and the Project Sponsor, suggested that intentional familiarization of RCWS with the experience and skills of its members can help match individual expertise with service opportunities with better accuracy and make members feel more appreciated as a result (personal communication, June 10, 2016). Enhanced membership retention at RCWS would allow the club to take full advantage of its diversity in order to increase the volume and quality of its participation in humanitarian service, thereby maximizing brand awareness among potential sponsors, community partners, and prospective members looking to join a volunteer organization (Randle, Leisch, & Dolnicar, 2013, p. 693).

### **System Analysis of the Inquiry**

The prevalent approach to addressing organizational issues has often been rooted in the intentional compartmentalization of a complex issue into smaller parts, which, as it was commonly assumed, made the process of finding solutions easier (Senge, 2006, p. 3). Such an

approach, however, failed to see organizational entities as dynamic systems with their own "personalities" (Laszlo, 1996, p. 5). Fragmentation of a given organizational issue often neglects the integrity of the system under consideration because "natural systems are wholes with irreducible properties" (Laszlo, 1996, p. 25). Snowden and Boone (2007) have shown that systemic complexity can lead to emergence of multiple solutions to a given organizational issue, if the leader exhibits sufficient patience to probe and sense prior to issuing a diagnosis (p. 74). It becomes imperative, therefore, to consider RCWS as a dynamic system with its own internal relationships and external factors affecting its progression in order to contextualize the issue of member retention within the organization.

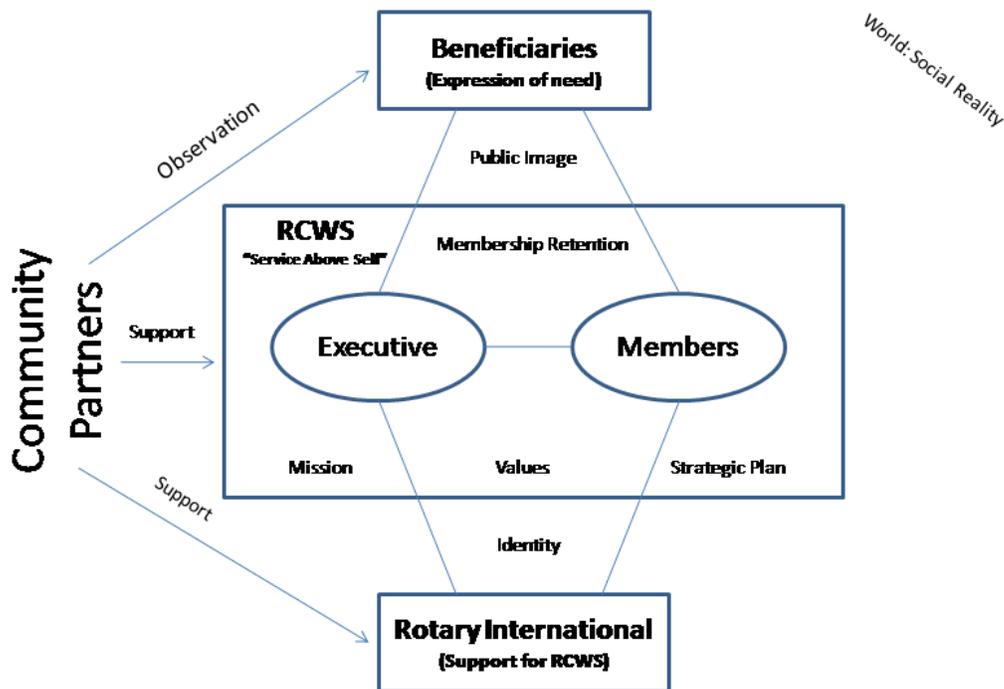


Figure 1. A systems diagram of RCWS and the external influences

Cady (2016) has plausibly illustrated how the internal system framework can be explored through the prism of "interpersonal and social dynamics" (p. 10), which is concerned with how groups within an organization relate to each other. The internal system dynamic at RCWS is characterized by the relationship between the executive board and the club members, as demonstrated in the Figure 1. The executive board is comprised of seven volunteer leaders who are also RCWS members responsible for coordinating the club's development in the areas of administration, public relations, and community service. Decision-making on the matters pertinent to the club occurs during monthly executive meetings, however, all club members have the opportunity to vote in favour of or against the board's proposed decision. The club has recently initiated monthly assembly meetings to update the membership body on the status and progress of RCWS, which, in turn, has noticeably improved information sharing and gave the members a better sense of ownership over the direction of the club (T. Sutherland, June 10, 2016). The new improvement in the information sharing process is a "trust-building initiative" (T. Sutherland, personal communication, June 10, 2016) that allows each member to exercise power by contributing to the decision-making process (Githens, 2009, p. 421). As Kotter (2007) and Rowe, Graf, Agger-Gupta, Piggot-Irvine, and Harris (2013) demonstrated, organizational change requires such factors as an established sense of urgency, effective communication, and collaboration. The assumption is that the effort undertaken to improve communication between the board and the members in the hope of inspiring better ownership of the future of RCWS will form a favourable foundation for a collective exploration of ways in which membership retention at RCWS can be enhanced.

Pertinent to visualization of the internal dynamic at RCWS is also the use of "the human resources frame" (Bolman & Deal, 2013). The concept of a frame refers to a set of presumptions

that enable one to "negotiate a particular 'territory'" (Bolman & Deal, 2013, p. 10). The basic assumption made by the human resources frame is that "organizations exist to serve human needs" (Bolman & Deal, 2013, p. 117). The transaction in the interconnection between organizations and people is that "[i]ndividuals find meaningful and satisfying work, and organizations get the talent and energy they need to succeed" (Bolman & Deal, 2013, p. 117). Effective Rotary clubs benefit from attraction and retention of a diverse membership contingent, since diverse clubs collectively possess "a wider range of skills, increased volunteer resources, expanded leadership prospects, and enhanced fundraising potential" (Strengthening Your Membership, n.d., p. 5). In Sutherland's assessment, the executive board can be more effective at identifying strengths of its current and new members and applying them appropriately to service projects undertaken by the club (personal communication, June 10, 2016). Another factor that potentially affects RCWS's ability to retain members is the absence of a clear communication of the organizational mission and values to existing and prospective members (T. Sutherland, personal communication, June 10, 2016). As Barrett (2010) has shown, value congruence is fundamental for effective attraction and retention of talented individuals who can help propel the organization forward (p. 5). Similarly, Senge (2006) contended that lack of alignment in an organization can lead to "wasted energy" (p. 217). When alignment is present, however, constituents no longer have to relinquish their personal pursuits in order to accomplish a common goal, but rather, "the shared vision becomes an extension of their personal visions" (Senge, 2006, pp. 217-218). The latter analysis yields an assumption that improved congruence between the club's vision and values and the members' individual aspirations can help enhance membership retention.

There are also several external systems that influence RCWS. As illustrated in Figure 1, the external systems are properly identified as beneficiaries, community partners, and Rotary International. Failure of the system to see its connectedness to external factors results in organizational "incapacity" (Wheatley, 2005, p. 205).

In order to understand the influence of external factors on RCWS, it is helpful to consider the organization through "the political frame" (Bolman & Deal, 2013, p. 189). Characteristic of the political frame is the view of organizations as "coalitions" (Bolman & Deal, 2013, p. 189) in which decisions are impacted by "bargaining, negotiation, and jockeying for position among competing stakeholders" (Bolman & Deal, 2013, p. 190). In the words of Stocks, a former district governor for Rotary International District 5020, of which RCWS is a member, "Rotarians are human doings" (personal communication, July 16, 2016). Such a characterization depicts the humanitarian nature of the organization rooted in the motto "service above self". However, RCWS's capacity to offer service is contingent upon the beneficiaries' clear and honest expression of needs, so that the club can be a careful steward of the resources at its disposal (D. Stocks, personal communication, July 16, 2016). While the beneficiaries' expression of needs affects the scope of fundraising initiatives undertaken by RCWS, it also influences ways in which RCWS will utilize its members to acquire resources necessary to meet those needs. RCWS, therefore, can be seen as a "political actor" (Bolman & Deal, 2013, p. 231), whose existence is closely entangled with external voices and their expectations (Bolman & Deal, 2013, p. 231).

Rotary International, as an external system, is a steward of the organizational identity, responsible for validating RCWS as a member of the association of Rotary Clubs (Rotary Code of Policies, 2016, p. 9). Its mandate is to offer support to RCWS and other clubs through

financial grants and district conferences that provide orientation for new members and training for executive board members (D. Stocks, personal communication, July 16, 2016). In turn, various community partners notice the public image of RCWS shaped by its direct involvement with beneficiaries and offer support for RCWS fundraising initiatives (D. Stocks, personal communication, July 16, 2016).

In relation to the overarching inquiry, a series of underlying assumptions arise from the political frame analysis. Beneficiaries' needs dictate how RCWS applies its available human resources to address social issues, which makes the inquiry into enhancement of membership retention an urgent task. Membership retention is directly connected to the volume and variety of service that can be offered to beneficiaries and, therefore, influences the appeal of the public image of RCWS for potential community partners and interested prospective members.

### **Overview of the Thesis**

The framework of this chapter served to establish the context of RCWS within which the inquiry into enhancement of member retention takes place. A systemic overview of RCWS was offered to demonstrate the complexity of RCWS, as a social system, with its internal relationships and dynamic external influences. Chapter Two intends to mine the depth of scholarly discourse on themes pertinent to the overarching inquiry question and the sub-questions. Conceptual understanding gained in Chapter Two will be synthesized with findings to draw conclusions relevant to the inquiry. Chapter Three is primarily concerned with framing methodological approaches utilized by this study, identifying relevant ethical issues, and narrating the process of data collection. Following the discussion of implemented inquiry methods, project findings and formulated conclusions will be reported in Chapter Four. Attention will be given to findings as they relate to the overarching inquiry question and the sub-questions.

Drawn conclusions will depict the current portrait of the organizational dynamic and subsequent recommendations will apply the findings and diagnostic statements to the inquiry. In turn, Chapter Five offers a synthesis of the inquiry process and outlines practical steps for the organizational change process within the RCWS. It intends to provide clarity in regards to identifiable steps that can be taken by the RCWS to enhance member retention. In the subsequent chapter, I turn my attention to exploration of the scholarly discourse on current volunteer retention practices evidenced in the non-profit sector.

## **Chapter Two: Literature Review**

An inquiry into an organizational system presumes a close consideration of its constituent elements and their interconnectedness (Cabrera, Cabrera, & Powers, 2015, p. 536). Of importance to this inquiry is the task of contextualization, which creates the awareness of a change that needs to take place (Snowden & Boone, 2007, p. 75). This particular chapter explores the scholarly literature and specific concepts that are contextually relevant to the inquiry question: How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention? Selection of concepts from the literature that further informed the inquiry process was framed by the following sub-questions:

- 1) What are the factors that influence membership attraction and retention for RCWS?
- 2) What member retention efforts currently exist at RCWS and are they effective? If so, how could these be strengthened and augmented?
- 3) What are the barriers to member retention at RCWS and how can these be reduced?
- 4) What other membership retention strategies can be implemented and who needs to be involved?

Since RCWS is a volunteer-driven entity, it was imperative to focus on attraction and retention of volunteers in addition to conceptualizing volunteerism in the first part of the literature review. The second part of the literature review covers such areas as non-profit organizational culture and leadership in volunteer-driven, non-profit organizations.

### **Volunteer Recruitment and Retention in Non-profit Organizations**

In recent past, the non-profit sector functioned in a less competitive milieu with non-profit entities appropriately filling the niche of contribution to social welfare through unique approaches and services. With the ensuing economic uncertainty and an ever-expanding reality

of human need, however, there has been a remarkable growth in the number of non-profit organizations seeking to contribute to the common good, while vying for volunteer participation (Randle, Leisch, & Dolnicar, 2013, p. 690). The particular nature of the non-profit sector is characterized by an increased dependence on unpaid workers who make up a significant number within its labour force (Haivas, Hofmans, & Pepermans, 2013, p. 1869). A study of non-profit organizations with 200 or less employees reported an astounding ratio of 11.7 volunteers to one employee (Wisner, Stringfellow, Youngdahl, & Parker, 2005, p. 144). Such a dependence warrants special consideration, since volunteering is understood as a "freely chosen and deliberate helping" (Haivas et al., 2013, p. 1869) that extends over an indefinite amount of time. Snyder and Omoto (2008) further emphasized the fleeting character of volunteering, suggesting that it can either materialize as a short-term provision of assistance or a prolonged commitment to a form of service (p. 2). Kwok, Chui, and Wong (2013) similarly described volunteering as a unique expression of "prosocial behaviour" devoid of an obligation to be continued (p. 1315). It is surprising that despite the fleeting character of volunteering and the apparent scarcity of human resources in a highly competitive non-profit sector, organizations have shown little intentionality in developing proactive volunteer management approaches (Hager & Brudney, 2004, p. 1).

**Understanding volunteers.** In an attempt to explore volunteer behaviour, Clary, Snyder, Ridge, Copeland, Stukas, Haugen, and Miene (1998) produced a study assessing six motives that could potentially impact one's decision to volunteer. The six motives that could be measured with a Volunteer Functions Inventory were (a) expression of humanitarian values; (b) search for knowledge and understanding; (c) pursuit of career benefits; (d) protection from feeling of guilt associated with being more fortunate than others; (e) enhancement of individual

sense of self-worth; and (f) a sense of belonging to influential social groups (Clary et al., 1998). Advocating a functionalist approach to conceptualization of volunteering that is primarily concerned with the reasons that prompt volunteer activity, the study argued that each individual possesses any number of the six motives and, subsequently, concluded that volunteer engagement is caused by how closely volunteer experiences match the individual's core motives (Clary et al., 1998). Alternatively, while characterizing volunteerism as an expression of social action, Snyder and Omoto (2008) articulated its six defining facets as (a) service to humanity offered on the basis of one's free will; (b) activity caused by intentional deliberation; (c) activity extended over an indefinite amount of time; (d) activity inspired by the pursuit of personal goals; (e) service offered specifically to those in need; and (f) activity exercised through other agencies or organizations (p. 2). Therefore, characteristic of volunteerism, according to Snyder and Omoto (2008), is the individual's intentionality in selecting volunteer opportunities and committing to them on the basis of personal values and intrinsic motivations (p. 3).

It is imperative to note that volunteerism is a form of behaviour rooted in motivation. Bussell and Forbes (2002) observed that there is an "element of exchange in volunteering in which volunteers respond to costs and benefits" (p. 246). Fundamentally, volunteer behaviour is prompted by the innate desire to gratify either an altruistic disposition or an egoistic orientation associated with a social or a psychological goal (p. 249). For some, volunteer behaviour is the truest form of self-identification, which results in a vivid expression of personal core values (p. 249). Nave and Paco (2013) similarly concluded that values are a significant determinant in volunteer activity, demonstrating the individual's desire for contribution to a specific social cause (p. 39). For others, engagement in volunteer activity is inspired by an egoistic orientation, such as acquiring skills and experience necessary for furthering a professional career path (Bussell &

Forbes, 2002, p. 249). As Hallman and Harms (2012) have shown, incorporation of a direct feedback process in volunteer coordination practices can enhance volunteer engagement, since a prominent cause of volunteer activity is the drive for "personal growth" (p. 287).

Pertinent to an informed discussion of volunteerism is also the link between an organizational context and volunteer motivation. Organizational context can both sustain and disrupt volunteer motivation (Schie, Guntert, Oostlander, & Wehner, 2015, p. 1572). Therefore, the primary responsibility of non-profit management lies in cultivating an organizational reality that abstains from sustaining volunteer motivation through external pressure, since perceived evidence of pressure from an organization negatively affects volunteer motivation (Schie et al., 2015, p. 1572). In order to recognize ways in which an organizational context can either enhance or inhibit volunteer motivation, Self-determination Theory (SDT) has been effectively utilized (Haivas et al., 2013; Schie et al., 2015). According to Deci and Ryan (2000), SDT posits that individuals in a given social environment strive to satisfy the three basic psychological needs: freedom to decide and act, competence in meeting performance standards, and meaningful connection with others (as cited in Haivas et al., 2013, p. 1870). Therefore, intrinsic motivation to perform tasks can be enhanced by an environment that is structured to meet the basic psychological needs of individuals. In their discussion of SDT and its implications for volunteering, Schie et al. (2015) further differentiated between "general self-determined motivation" (p. 1574), associated with internal confidence in a certain cause, and "organization-focused self-determined motivation" (p. 1574), associated with volitional internalization of the organizational mandate. The authors concluded that volunteer participation can be sustained "by fostering the individual experiences of self-determination" (p. 1586).

It becomes apparent that the non-profit sector's dependence on volunteer participation inevitably challenges it to become more adaptive to volunteers' motives, attributes and availability (Wisner et al., 2005, p. 154). As Wisner et al. (2005) argued, the primary task facing non-profit organizations today is to "create a volunteer work experience that motivates the volunteer to remain loyal" (p. 145) and to structure a "service delivery system that efficiently uses the skills and abilities of the volunteer" (p. 145), thereby cultivating engagements that reward its participant with satisfaction. In exploring the connection between motivation to volunteer and satisfaction, Shye (2010) utilized a Systemic Quality of Life Theory (SQOL) to demonstrate that an individual is an integral part of a given social milieu, whose ability to perform is contingent on relationships and interactions with others. According to Shye (2010), individuals are concerned with the condition of their human environment and search for the opportunity to establish friendships and a "sense of belonging to community" (p. 198), thereby extending beyond the notion of an isolated self. Conversely, in their study of volunteer motivation and life satisfaction, Kwok, Chui, and Wong (2013) retracted the focus back to self and its intrinsic and extrinsic volunteering motivations. Personal values and needs constitute intrinsic motivations, while pursuits of outcomes posited by an external entity constitute extrinsic motivations (Kwok et al., 2013, p. 1317). Kwok et al. (2013) proceeded to conclude that in the course of a volunteering experience satisfaction is more directly related to fulfillment of intrinsic motivations, which can include the longing for socialization (p. 1326).

An informed understanding of volunteers cannot be detached from a knowledge of factors that motivate their participation. Moreover, as Bussell and Forbes (2002) noted, the recruitment and retention strategies in the non-profit sector are successful only for as long as they take the motives of volunteers into consideration (p. 248). Hager and Brudney (2004)

similarly observed that inability of non-profit entities to retain volunteers is often caused by the common failure to create experiences that are both enjoyable and meaningful for those electing to participate (p. 9). Costa, Chalip, Green, and Simes (2006) further suggested that volunteer experiences are made up of two stages: training and task execution (p. 167). Volunteers, therefore, "evaluate their experience in terms of the quality of their training and the satisfactions they obtain on the job" (Costa et al., 2006, p. 167). Creation of meaningful experiences that would bring satisfaction, however, cannot be attained without the recognition that, at its core, volunteer diversity is rooted in unique motivational profiles nurtured by individuals' affinity for either intrinsic or extrinsic pursuits (Haivas, Hofmans, & Pepermans, 2014, p. 329). Haivas et al. (2014) advised that organizational frameworks in the non-profit sector need to consider two key differences in the emerging volunteer population, such as the desire for optimal autonomy in addressing challenges that would contribute to personal growth and the search for close relationships with other volunteers and beneficiaries, fulfilling the ingrained need to belong (p. 339).

To summarize, volunteer behaviour is determined by motivation, which can either be caused by an internal altruistic disposition or external psychological and social goals. Non-profit organizational context can serve as both a sustaining and a disruptive force for volunteer motivation. It is imperative, therefore, for non-profit organizations to adapt to motivations of their volunteer workers in order to increase volunteer satisfaction. Next, the literature review will address factors that affect volunteer attraction.

**Recruitment of volunteers.** In the effort to conceptualize volunteerism, research has particularly neglected to see volunteerism as a "form of symbolic consumption" (Ho & O'Donohoe, 2014, p. 869). It is imperative to note that "volunteering motives are often linked to

identity" (Ho & O'Donohoe, 2014, p. 869), since potential recruits' views of volunteering are directly linked to their perception of present volunteer groups (Ho & O'Donohoe, 2014). Thus perceived negative images of volunteering can adversely impact the individuals' desire to participate and to respond positively to a recruitment initiative (Ho & O'Donohoe, 2014, p. 869). Randle and Dolnicar (2012) similarly contended that recruitment strategies assumed by the non-profit entities should be shaped by the awareness of cultural views of volunteering that may require contestation before a genuine recruitment call can be properly presented (p. 364). Volunteer marketing strategies, therefore, have to appeal to individuals and address the contextual social milieus of which these individuals are a part (Randle & Dolnicar, 2012, p. 364). Within the multicultural climate of our society, generic recruitment communications are deemed largely ineffective by the current reality of diverse cultural and experiential perceptions of volunteering. Ho and O'Donohoe (2014) further posited that subjective perceptions of volunteering shaped either by a cultural context or a previous volunteer experience can be effectively transformed through use of "advertising testimonials" (p. 871) that share firsthand inspirational accounts of impactful volunteer experiences. Haug and Gaskins (2012) also suggested that such narratives of personal experience with volunteering can become a part of a "personalized approach to recruitment" (p. 208), whereby those already involved with an organization contact potential recruits in order to share their story. As Randle et al. (2013) have shown, organizations with the "Heroes image" are less likely to struggle with marketing in the non-profit sector (p. 701).

An important theme in the literature on volunteer recruitment is intentionality of volunteer management practices towards the human capital in the non-profit sector. Ward and McKillop (2010) observed that organizations in the non-profit sector can benefit from matching

the skills of volunteer human capital to particular job profiles, which can be accomplished through an initial screening process (p. 385). Snyder and Omoto (2008) reinforced the same observation by urging non-profit organizational structures to adapt to unique motivations of their volunteers and, therefore, "enhance their effectiveness, satisfaction, and longevity of service" (p. 22). In their exploration of the effect of age on volunteer contribution, Caldwell, Farmer, and Fedor (2008) further noted that volunteer management practices need to adapt to generational differences. In their study they discovered that while older and younger volunteers performed effectively in structures with effective screening processes, older volunteers, unlike their younger counterparts, felt disoriented in environments that lacked a formal volunteer orientation component (p. 325). This difference could be explained by increased preparedness of younger volunteers to learn in order to achieve the performance standard, whereas older volunteers are more inclined to fill roles that take immediate advantage of their expertise and provide them with opportunities for socialization (Caldwell et al., 2008, pp. 325-326). Moreover, younger volunteers are more likely to become dissatisfied with excessive supervision due to their desire to exercise greater independence in accomplishing a particular task (Hager & Brudney, 2015, p. 250). Hager and Brudney (2015), therefore, similarly attested that contemporary management practices in the non-profit sector need to target demographic groups specifically in order to succeed in the task of recruitment (p. 251). Volunteer administration is in dire need of leadership that can assess internal organizational dynamic and the impact of external cultural forces, while recognizing individual potential of the human capital and appropriately matching it with roles that serve the fulfillment of organizational mandate (Hager & Brudney, 2015; Sundeen, Raskoff, & Garcia, 2007).

Research also demonstrated that non-profit organizations with strong social networks increase the likelihood of attracting volunteers (Boezeman & Ellemers, 2008). According to Boezeman and Ellemers (2008), attraction of volunteers can be stimulated through consistent communication that "the organization invests in and cares for its volunteers" (p. 1024). Utilizing the network of its current volunteer capital, non-profit organizations can promote practices and display specific ways in which volunteers become subject to individual support from the organization in fulfilling their assigned responsibilities (p. 1024). Studies have shown that most effective volunteer attraction results from active volunteers recruiting non-volunteers through personal contact, utilizing existing social ties (Hager & Brudney, 2015; Hustinx, Cnaan, & Handy, 2010; Lee & Brudney, 2012). Such endorsement of existing practices of a given non-profit entity, coming from active volunteers who present themselves as direct beneficiaries of received support, can induce respect from among the recruits towards the organization (Boezeman and Ellemers, 2008, p. 1024). In addition, social support for volunteer capital can also be established in showing how potential recruits can utilize their strengths within the organizational framework to offer valuable humanitarian service. Sundeen et al. (2007) proposed that non-profit organizations should be especially careful not to isolate persons of low socio-economic status from volunteering, since they can effectively "define the needs of the community and participate in meeting them" (p. 298). O'Dwyer and Timonen (2009) also noted that non-profit entities can improve recruitment by showing potential volunteers how their strengths can support the organizational effort for social change, thereby recognizing individuals as agents of impact within the system (p. 47). The latter observation provided by O'Dwyer and Timonen (2009) supports the assertion articulated by Boezeman and Ellemers (2008) that volunteer recruits assess the level of "pride and respect" (p. 1014) they will be able to garner for

an organization before committing to join it. Helping potential volunteers to see how their contributions can positively enhance the organizational output can undoubtedly induce that level of pride and respect, which will positively attract them to an organization (Boezeman & Ellemers, 2008, p. 1014).

In short, perceptions of volunteerism are shaped by cultural and social milieus, which render generic marketing pleas undertaken by non-profits obsolete. Personal narratives that depict positive individual volunteer experiences are instrumental in contesting negative perceptions of volunteering. In order to enhance recruitment, non-profits are encouraged to take advantage of social ties that current volunteers may have with potential recruits and assume an individualized approach to demonstrating how one's intangibles and skills can be properly utilized within a given organizational structure. Ensuing is the review of literature on current practices that enhance volunteer retention in the non-profit sector.

**Strategies that enhance retention of volunteers.** In their study of volunteer administration practices used by charities, Hager and Brudney (2004) observed that volunteer retention primarily relates to organizational culture and solicits the question of whether the organization facilitates "the kind of climate that welcomes and encourages volunteers" (p. 10). While the bond between non-profit entities and their volunteers is "mutually beneficial" (Garner & Garner, 2011, p. 814), unlike paid workers, volunteers are less inclined to persevere through organizational struggles and often elect to depart from the organization (p. 814). It becomes evident, therefore, that the non-profit sector is directly responsible for cultivating the appropriate organizational climate that would be inclusive and rewarding for volunteer participation. Burns (1978) has shown that traditional management practices have been dominated by the transactional leadership approach, founded on the culture of reward or punishment (as cited in

Dwyer, Bono, Snyder, Nov, & Berson, 2013, p. 185). However, cultivation of a climate most suitable for volunteer retention has been attributed to transformational leadership (Dwyer et al., 2013). Volunteers have been described as "more satisfied with their service when team leaders are inspirational, show concern about their development, involve them in decisions and focus on the meaning of the work" (Dwyer et al., 2013, p. 198). Stirling, Kilpatrick, and Orpin (2011) also suggested that volunteer retention is contingent on non-profits favouring a relational approach to management in place of a transactional one (p. 333).

Offering space for a volunteer voice is an important step in strengthening volunteer retention. Volunteers derive their sense of identity from their experience with a non-profit organization (Pauline, 2011, p. 23). Often they enter a given non-profit structure with an identity that has been shaped by past volunteer experiences, which requires of volunteer administrators to be attentive to the expectations of those that they lead (Pauline, 2011, p. 23). Garner and Garner (2011) observed that in organizations where volunteers possess supplemental roles in offering frontline support to paid staff, volunteer feedback may not be required (p. 824). Bortree and Waters (2014), however, challenged that conclusion, suggesting that non-profit organizations are responsible for facilitating a social environment of inclusivity, in which there is room for volunteers for face-to-face contact with the administration. Bortree and Waters (2014) further argued that the act of empowering volunteers to have a voice in decision-making strengthens their long-term relationship with the organization (p. 229). The primary task of the non-profit sector in relation to volunteers is to provide the kind of a volunteer experience that would ensure "loyalty and satisfaction" (Hustinx & Handy, 2009, p. 217). It is important to note, however, that mission and vision statements in themselves do not generate volunteer retention, but rather provide a framework "against which the volunteers are socialized locally" (Hustinx & Handy,

2009, p. 218). On the contrary, it is precisely the strength of internal social bonds, support from staff and the richness of volunteer experience that nurture a sense of attachment to an organization (Hidalgo & Moreno, 2009; Hustinx & Handy, 2009). Furthermore, as Shantz, Saksida, and Alfes have shown (2014), non-profits that facilitate social connections between volunteers and beneficiaries are more likely to generate sustained volunteer participation. Commitment of volunteers to an organization grows, when they can witness the direct influence of their efforts on the lives of those that they serve (Shantz et al., 2014, p. 691).

It is imperative to note that volunteer sustainability is not achieved by a "one-size-fits-all approach" (Hustinx & Handy, 2009, p. 217). A significant attention in volunteer sustainability should be given to value congruence, whereby organizational values need to shape organizational behaviour clearly enough for volunteers to evaluate their own fit with the organization (Garner & Garner, 2011; O'Donohue, Martin, & Torugsa, 2015; Schie et al., 2015). Furthermore, non-profits should design responsibilities in a way that would "enhance the motivational potential" (Schie et al., 2015, p. 1585). Haivas et al. (2013) argued that volunteers are more likely to engage with an organization long-term, if they feel they possess the freedom to choose projects and demonstrate their skills for the benefit of the organization (p. 1875). Similarly, Houle, Sagarin, and Kaplan (2005) noted that in volunteering individuals seek to satisfy their innermost needs and, therefore, the freedom to choose volunteer tasks that closely align with those needs generates a positive experiential outcome (p. 343). Thus volunteers who sense the presence of control over the nature of their involvement with an organization are more inclined to continue their engagement (Hidalgo & Moreno, 2009; Lee, Won, & Bang, 2014; Millette & Gagne, 2008). An interesting finding about the correlation between motivation and retention outcomes is that volunteers motivated by the desire to build up personal self-esteem

and exercise their values are more likely to remain with an organization than those volunteers who are driven by career development and personal growth (Garner & Garner, 2011; Newton, Becker, & Bell, 2014). The short-term nature of volunteering driven by career development could be explained by the desire to gain experience and skills necessary for personal advancement, which makes the specific volunteer commitment a mere temporary stop on the path towards an ultimate career goal (Newton et al., 2014, p. 526). The reason for volunteering can often be an accurate predictor of longevity, so initial interviews are a helpful tool for discovering volunteer motivation (Shin & Kleiner, 2003, p. 67).

Research on volunteer retention emphasized the notion of a "psychological contract" (PC) as a helpful construct for understanding the volunteer-organization relationship (Farmer et al., 1999; O'Donohue et al., 2015). PC presumes the reality of the volunteer's "subjective understanding of obligation-based exchanges with the organization" (O'Donohue et al., 2015, p. 131), which causes non-profits to become cognisant of what specifically "volunteers perceive them as obliged to provide" (Farmer et al., 1999, p. 362) in return for their contribution to the organization. It has been demonstrated that volunteers may expect an indication from an organization of how their efforts contribute to the mission of an organization and improve the quality of life for its beneficiaries (Farmer & Fedor, 1999; Hyde, Dunn, Wust, Bax, & Chambers, 2016; Millette & Gagne, 2008). Consistent with the human resource development approach is also the finding that volunteers welcome learning and development opportunities and consider those a sign of the organization's commitment to seeing their contributions grow (Cuskelly, Taylor, Hoye, & Darcy, 2006; Newton et al., 2014; O'Meara, Tourle, & Rae, 2012), which further results into a stronger volunteer commitment to an organization (Chew & Chan, 2008; Hager & Brudney, 2004). However, Cuskelly et al. (2006) issued a sound warning that excessive

implementation of human resource practices in the non-profit sector can negatively impact organizations with "a less formalised management culture" (p. 159) and, therefore, adoption of human resource practices should only follow after a careful consideration of organizational context. O'Donohue et al. (2015) further observed that volunteer administrators should carefully track emotions and behaviours of volunteers in order to establish "reasoned inferences about a volunteer's psychological state" (p. 143), which would, in turn, suggest whether the conditions of a psychological contract are being met in a given organizational climate.

Sustenance of active volunteer participation is also dependent on reaching a proper balance between organizational and volunteer needs (Hager & Brudney, 2004, p. 12). Non-profit organizations are responsible for creating a positive experience for their volunteers (Hager & Brudney, 2004). Mesch, Tschirhart, Perry, and Lee (1998) effectively characterized retention as a function of "the ability to do the work, compatibility of the job and other roles, and satisfaction with the job" (p. 16). Allen and Mueller (2013) contended that debriefing opportunities with volunteers aimed at resolution of challenges and clarity of expectations for volunteers are two ways to prevent volunteer burnout, which is closely associated with the intent to quit (p. 150). Wisner et al. (2005) reached an analogous conclusion, arguing that non-profit administrators should create space for volunteers to reflect on their value to the organization in order to find satisfaction in their experience (p. 157). Furthermore, recognition remains an important factor in ensuring continuous volunteer participation, since volunteers anticipate being reciprocated for their engagement in some form (Chew & Chan, 2008). Sellon (2014) observed that recognition, provided in the form of an oral endorsement or a certificate, is especially important for older and non-white volunteers (p. 430). Both, Phillips and Phillips (2011) and Wisner et al. (2005) asserted that personalized recognitions, those consistent with volunteers' motivations for

engaging with an organization, produce the most significant motivational impact. However, Phillips and Phillips (2011) provided an interesting recommendation that non-profit organizations can create reward packages for volunteers to choose from, thereby allowing organizations to better match individual objectives for volunteering (p. 31).

As evidenced by the literature review, organizational culture has a direct impact on the organizational ability to retain volunteers. Volunteers develop commitments to their respective organizations in the same way that employees do (Valeau, Mignonac, Vandenberghe, & Turnau, 2013). Non-profits, therefore, are responsible for cultivating the kind of a climate that will foster volunteer inclusivity and reward participation. Non-profit administrators should familiarize themselves with their volunteers' expectations and monitor their psychological state. In an effort to accomplish their mandates, non-profits should be especially careful not to overlook the needs of their volunteers.

### **Non-profit Organizational Culture**

Schein (2004) contended that an organization is a "social unit" (p. 11) that evolves a culture. He understood culture as a "striving toward patterning and integration" (p. 17). Myatt (2014) further observed that the definition of a culture should not be limited only to a scheme or a framework, since the constituents within an organization also become the culture of that organization (p. 39). The non-profit sector is characterized by the prospect of membership turnover that can occur at any given moment (Catano, Pond, & Kelloway, 2001). Therefore, of special importance is the focus on the relationship between volunteer leaders and followers in a non-profit organization, since it is precisely the interaction between the two that provides the impetus for successful integration of the human capital into the structure of an organization (Catano et al., 2001, p. 256).

Catano et al. (2001) advocated for abandonment of traditional transactional leadership, founded on the premise of punishment and reward, in favour of transformational leadership, characterized by a more inspirational approach. Transformational leadership is defined by the "ability to elicit support and participation from followers through personal qualities" (Catano et al., 2001, pp. 256-257), thereby causing the followers' positive emotional response exhibited in "joy, pride, admiration, and enthusiasm" (Rowold & Rohmann, 2009, p. 280). Jager, Kreutzer, and Beyes (2009) further argued for adoption of a "relationship-driven conduct of leadership" (p. 91) in the non-profit sector, which would show the capacity to strike a balance between attending to individual stances of volunteers and retaining a focus on organizational mandate (p. 91). Herman and Renz (2008) similarly noted that the long-term success of non-profit entities is contingent on their preparedness to attend to stakeholder expectations, both internally and externally (p. 410). Given the consensus of scholarship on the importance of viewing leadership as a relational construct, an exploration of non-profit organizational culture is coupled with consideration of a leadership response that it elicits.

**Exploring non-profit organizational culture.** The most recent economic recession created greater demand for services provided by non-profit organizations (Jensen & McKeage, 2015, p. 175). Non-profit organizations faced the challenge of meeting a more significant expression of need with limited resources and organizations' reliance on volunteers noticeably increased (Jensen & McKeage, 2015, p. 175). The society has often understood volunteering as "a key strategy of community engagement and participation" (Woodill, 2008, para. 1). In addition to investment of personal time and effort, volunteers enrich organizations by improving community programs, offering new insights and positioning themselves as catalysts for social welfare (Jensen & McKeage, 2015, p. 176). In return, volunteers receive exposure to

opportunities that bring self-fulfillment and professional growth (Woodill, 2008; Boezeman & Ellemers, 2009). Despite the transactional nature of the relationship between non-profit organizations and volunteers, it has been observed that volunteers are less likely to remain invested in resolving organizational challenges and elect to leave instead (Garner & Garner, 2011, p. 814). Volunteer turnover requires additional resources for recruitment and training, disrupts organizational culture, and causes stagnation of the organization's forward momentum (Ferreira, Proença & Proença, 2012, p. 28). Despite the prevalent problem of volunteer retention and its negative effect on the organizational culture, both "volunteers and volunteer administrators remain undervalued resources" (Jensen & McKeage, 2015, p. 176). The problem with volunteer retention in non-profit organizations is partially caused by the excessive focus on "professionalization" (Woodill, 2008, para. 6) of volunteer management and failure to see how implemented practices undermine the relationship between non-profit administration and volunteers (Stirling et al., 2011, p. 322).

Contrary to the current preoccupation with professionalizing volunteer management, non-profit organizations should devote attention to "social inclusion and community development" (Woodill, 2008, para. 14). Traditional approaches to volunteer management have neglected quality of relationships, focusing instead on quick recruitment to fill open positions and treating volunteers as "resources or assets" (Woodill, 2008, para. 9) to be moved freely within the system. Stirling et al. (2011) similarly noted that "volunteers' unpaid engagement with organizations is based on social capital, consisting of social networks, trust, reciprocity and social norms" (p. 323). The notion of social capital is instrumental in nurturing a sense of belonging among volunteers leading to greater commitment to an organization, thereby increasing its effectiveness and decreasing the likelihood of expenses associated with

development of new recruits (Stirling et al., 2011, p. 323). Jensen and McKeage (2015) further recommended "[creating] intentional plans that provide volunteers the opportunity to socialize and build community with staff and other volunteers" (p. 183).

In her assessment of non-profit organizational culture, Woodill (2008) argued for a less hierarchical approach to volunteer management, "whereby staffers mentor volunteers, but volunteers also play a mentoring role, sharing expertise with staff" (para. 16). Jensen and McKeage (2015) also called for a greater "collaboration" (p. 185) between volunteer managers and volunteers on matters of program development (p. 185). In their view, program changes affecting constituents who are directly involved in the program should not occur without the voices of those affected by the process (Jensen & McKeage, 2015, p. 185). Garner and Garner (2011) also stressed the importance of including volunteers on committees responsible for decision-making processes relative to program development in order to "capitalize on volunteer feedback" (p. 825) and "optimize retention" (p. 825).

In short, contemporary non-profit culture is plagued by an excessive emphasis on incorporation of human resource frameworks into its structure. In this endless pursuit of creating professional non-profit entities, volunteers continue to be misused and overlooked as mere assets within the system. It becomes imperative to recover the view of volunteers as viable partners that have the potential to infuse new life into existing frameworks within the non-profit sector. Next, the literature review focuses on leading volunteers.

**Leading volunteers in non-profit organizations.** The primary distinctive of leading volunteers in non-profit organizations is that their followership has to be earned by the leader, rather than commanded (Camplin, 2009, p. 36). The relationship between leaders and volunteers in non-profit organizations is founded on trust, which is nurtured through the leaders' capacity to

acknowledge individualities of their volunteers and create appropriate space for unhindered expression of those individualities within the organizational parameters (Camplin, 2009, p. 37). Woodill (2008) similarly suggested that non-profit organizations can benefit from "a more fluid way" (para. 14) of establishing functional roles for their volunteers, omitting formal job descriptions in favour of an inquiry-based approach that seeks to identify volunteers' gifts and apply those contextually to organizational needs (para. 14). Given that volunteers look for their expertise to be valued and properly utilized in a non-profit setting, servant leadership style, characterized by its constituent-oriented approach, proves to be rather effective at inspiring followership (Schneider & George, 2011, p. 63).

At the heart of effective volunteer management lies a realization that leaders in non-profit organizations have to "consider the intrinsic needs, motivations, and goals of the volunteers they lead" (Posner, 2015, p. 887). Schneider and George (2011) further observed that volunteers feel more "empowered" (p. 64) when they know that their leaders have their best interests at heart and, as a result, are more likely to commit themselves to an organization (p. 64). Taking the reality of intrinsic needs into account, Boezeman and Ellemers (2009) in their study focused on the centrality of "relatedness needs" (p. 900) to volunteer retention, suggesting that the level of social integration of volunteers into a non-profit organization predetermines "their job satisfaction and intentions to remain" (p. 900). In addition, since there is no financial incentive for volunteering, there has to be evidence of "the increased value the individual receives from participating in activities that serve the organization's goals" (Camplin, 2009, p. 39). Jensen & McKeage (2015) stressed the importance value-building functions for volunteers that, in addition to recognizing their value to the organization, also create "opportunities for volunteers and staff to socialize outside of the typical work environment" (p. 186), thereby facilitating the necessary

level of social integration of volunteers into the organization. Posner (2015) asserted that effective leaders "link recognition and reward with performance" (p. 889) in order to communicate to volunteers how their contributions align with organizational values (p. 889). The direct outcome of such an alignment is "a strong sense of community and collective identity within the group" (Posner, 2015, p. 889).

To summarize, followership in non-profit organizations is earned through leadership behaviours that add value to the volunteer capital. In addition to their interest in offering a contribution to an organization, volunteers also look for a place to belong. Non-profit administrators must cultivate a communal environment that will properly contextualize individual strengths within the framework of an organization and offer opportunities for socialization with like-minded individuals.

### **Chapter Summary**

In order to deepen the understanding of non-profit organizations and volunteers, this chapter explored relevant scholarly literature. Given the nature of RCWS as a volunteer-driven, non-profit structure, it was imperative to conduct a comprehensive overview of current recruitment and retention strategies implemented in the non-profit sector in relation to the volunteer capital. In addition, attention was also given to the particulars of non-profit organizational culture and the leadership approaches that are deemed most effective for non-profits. The next chapter attends to the inquiry approach and methodology employed by this study.

### **Chapter Three: Inquiry Approach and Methodology**

This chapter describes a variant of action research, called Action Research Engagement (Rowe et al., 2013), as the inquiry approach undertaken in this study. In addition, I explain the inclusion of an appreciative stance in this inquiry. Further, I provide rationale for selection of participants and discuss the choice and implementation of data collection methods utilized in the course of this study. I conclude this chapter by outlining a number of considerations taken to ensure that ethical issues pertinent to data collection and analysis are minimized.

In order to address the issue of concern to RCWS, the following inquiry question was formulated: How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention?

The sub-questions that informed the overarching inquiry process are:

- 1) What are the factors that influence membership attraction and retention for RCWS?
- 2) What member retention efforts currently exist at RCWS and are they effective? If so, how could these be strengthened and augmented?
- 3) What are the barriers to member retention at RCWS and how can these be reduced?
- 4) What other membership retention strategies can be implemented and who needs to be involved?

#### **Inquiry Project Methodology**

The methodology employed for this study was Action Research Engagement (Rowe et al., 2013) with an appreciative stance. Coghlan and Brannick (2014) characterized action research as "research in action" rather than "research about action" (p. 6). The action research process seeks to engage components of the social system into active participation in identification and resolution of an organizational issue (Coghlan & Brannick, 2014, p. 6). The

voices of the people in the system shape the direction of the inquiry process and "co-generate knowledge" (Coghlan & Brannick, 2014, p. 6). Comparatively, Stringer (2014) asserted that all voices that either influence the organizational issue or sense its impact directly should be included in the inquiry process (p. 7). According to Stringer (2014), the framework of action research is represented by the "Look, Think, Act routine", which is embedded in three cycles of planning, implementation and evaluation respectively (p. 9). Similarly, Coghlan and Brannick (2014) described action research as a cyclical process in which organizational context and purpose shape construction of initial questions, planning, execution of planned steps, evaluation of outcomes, resulting in the end in further planning (p. 9).

Action research, therefore, is a construct that is properly understood as a collaborative engagement for a systemic change. Collaboration that occurs is between the members of the social system that are involved in data collection and the researcher who facilitates the inquiry process (Coghlan & Brannick, 2014, p. 47). Wicks and Reason (2009) contended that initiation of action research presumes establishment of "communicative space" (p. 248) that fosters "expression of interpersonal needs and the development of social contexts in which these needs are met..." (p. 248). Burns (2004) further alluded to the relational character of the action research process, suggesting that change results from constituents being equipped to "reflect on and gain new insights into the totality of their situation" (p. 232). In addition, the inquiry process involves qualitative research and focuses on verbal communication and observations that require proper contextualization and interpretation (Glesne, 2016, p. 283). The knowledge generated in the inquiry process becomes subject to collective consideration in the hope of assembling practical steps for future development (Coghlan & Brannick, 2014, p. 47). It is, therefore, imperative to note that this study implemented the Action Research Engagement (ARE) Model introduced by

Rowe, Graf, Agger-Gupta, Piggot-Irvine, and Harris (2013), which follows cycle one (See Figure 2), the Engagement Readiness Cycle (p. 20). The model, while it does not implement the full action research cycle, presumes implementation of practical steps emerging from the inquiry process and advocates subsequent evaluation of those steps. As such, the focus of this study was on direct engagement with an organizational issue that will result in a world cafe session with RCWS members, in which the learning will be shared and practical action steps suggested.

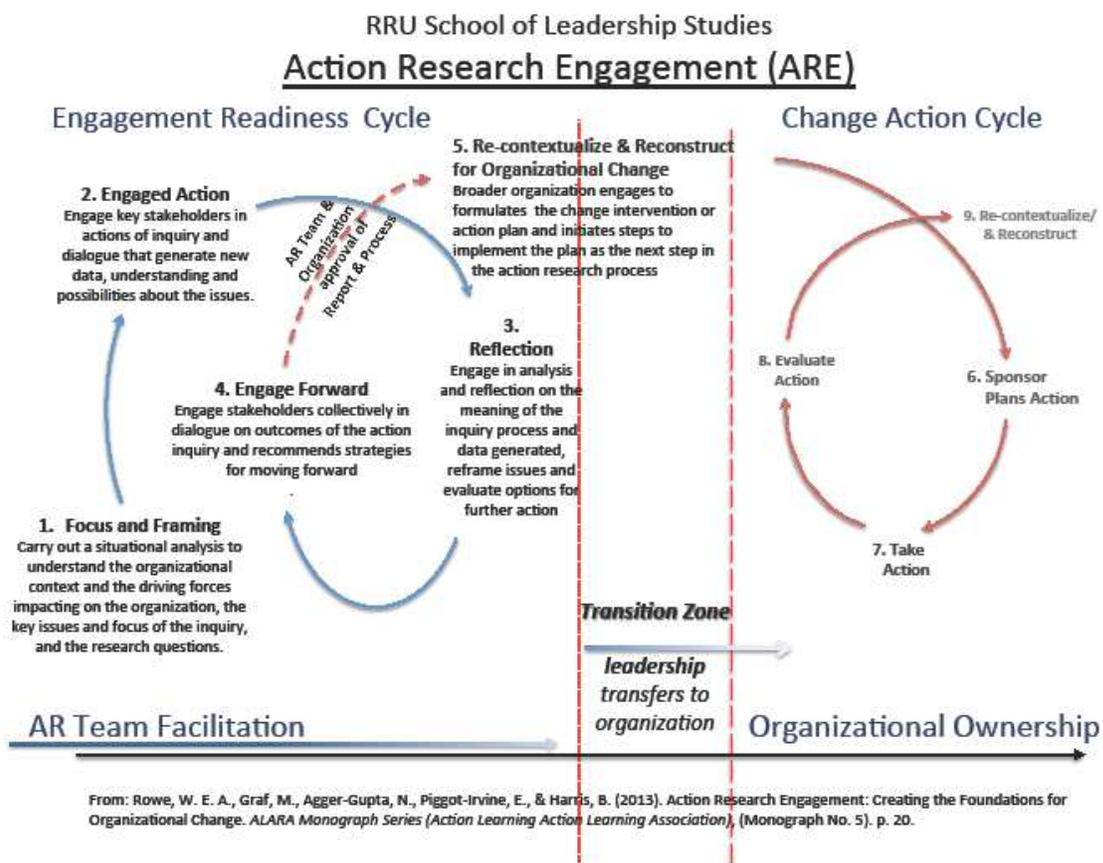


Figure 2. The Action Research Engagement Model

The assumption of an appreciative stance in the course of this study yielded an appropriate level of concentration on distinct organizational strengths that can be leveraged further to stimulate organizational development (Bushe, 2012). Unlike the traditional approach to resolution of organizational issues that begins with identification of existing challenges,

appreciative inquiry stance instead focuses on narratives that depict seasons in organizational life characterized by advancement and positivity (Watkins, Mohr, & Kelly, 2011, p. 112). As such, the influence of an appreciative inquiry stance on the present study resulted in intentional consideration of current positive organizational behaviours relative to member retention practices that required further development within RCWS (Lewis, Passmore, & Cantore, 2008, p. 24). In line with the appreciative inquiry model, stakeholders provided input on their positive experiences at RCWS, thereby sharing their vision of the future and offering clues that could potentially inform strategies for future change. As Bushe (2012) concluded, it is precisely these "generative conversations" (p. 17) between the researcher and participants that induce the momentum necessary to transform the present.

In the context of this study, the framing of positive questions allowed for a shift of focus from dwelling on existing problems to envisioning potential strategies for enhancement of distinct organizational strengths (Watkins, Mohr & Kelly, 2011). Intentional positivity in the framing of questions and ensuing generative conversations were congruent with the ethical guide of Rotary that stresses the importance of fairness, goodwill and mutual benefit in the execution of all behaviours ("Guiding principles", n.d.). The emphasis on exploring current positive behaviours and creating space for envisioning future possibilities set the stage for the Discovery and Dream phases of the appreciative process (Bushe, 2013). External to the scope of this study are the Design and Delivery/Destiny phases that ask stakeholders to develop and execute concrete steps, implementing the learning accumulated in the course of the inquiry (Bushe, 2013).

This inquiry employed a multi-method approach to obtain qualitative data. The qualitative research concept is rooted in collection of constituents' experiences and views for the

purpose of defining "the problem or issue in terms that 'make sense' in their own terms" (Stringer, 2014, p. 101). In the context of action research, the qualitative research paradigm positions each stakeholder as a participant in discernment of an organizational challenge, development of an understanding of the situation, and articulation of practical steps (Glesne, 2016, p.25), thereby disrupting the negative influence of subjective interpretation. Therefore, the qualitative research concept, unlike the traditional quantitative approach, seeks to understand the issue from the perspective of those affected by it and form a view of the processes responsible for a given construction of organizational reality (Stringer, 2014, p. 101). In addition to surveys, interviews and a focus group were used in this study to inform subsequent recommendations. This approach to using multiple methods and multiple sources for data collection is known as triangulation (Glesne, 2016; Stringer, 2014). The inquiry findings and draft recommendations were presented to the Sponsor and several members of the executive board in order to validate the conclusions, prioritize recommendations, and visualize subsequent action steps.

### **Project Participants**

In commenting on the nature of stakeholder participation in action research, Stringer (2014) asserted that the role of the researcher is to facilitate an inviting environment that provides the participants with the sense of power over decision-making that will lead to systemic change (p. 28). Inclusion of participants in action research is guided by the understanding of connections that various groups of participants may have to the inquiry question (Stringer, 2014). Excluding myself, all 22 club members were invited to participate in this project. The internal stakeholders were represented by 15 club members and seven executive board members. Together both groups of internal stakeholders represent the RCWS and, therefore, were included in the inquiry process in line with Weisbord's (2012) claim that a systemic change necessitates

the gathering of all voices. All 15 club members that were invited to participate in the online survey submitted their responses. Out of seven executive board members invited to take part in the focus group, six agreed to offer their input.

In addition, Weisbord (2012) alluded to the concept of an open system, suggesting that a social system's functioning does not occur in isolation from external influences, consideration of which can assist with the process of sense-making (p. 181). The stakeholder groups, external to RCWS, which could speak into the issue of member retention, have been previously identified as beneficiaries, community partners, the general public, and the Rotary International. Prospective members for Rotary clubs are traditionally drawn from the aforementioned external groups. It was anticipated that the external stakeholder voices would assist with the objective characterization of the public image of RCWS, the club's participation in community, and their individual experiences with the club. While it is beyond the scope of this study to include all external stakeholders in the inquiry process, a "snowballing" (Stringer, 2014) technique was utilized to identify a total of four individuals from external stakeholder groups with the help of the Project Sponsor (p. 81). Each external stakeholder group was represented by at least one individual to ensure diversified input (Weaver & Cousins, 2001, p. 30). The four participants from the external stakeholder groups included a community literacy program coordinator as the beneficiary, a donor and a community member, representing community partners and the general public respectively, and an acting Rotary International officer. All four external stakeholders were interviewed over the phone.

Given the exclusively democratic nature of Rotary where each voice matters and decision-making is driven by majority votes, the power over issue was not influential enough to warrant adjustments in the structure of this study. I also decided that an inquiry team was not

necessary given the nature of methodology that was employed in the research process. Decisions and recommendations obtained from the research process and, in turn, shaped by the organizational context, will be implemented by the executive board. It is imperative to note that the focus group served the dual purpose of a data collection method and a "Make-It-Happen" event, where the perspectives from RCWS members and external stakeholders were engaged by the executive board members.

### **Inquiry Methods**

This section details the methods utilized during the inquiry process. It includes a description of how the study was conducted and outlines approaches to data analysis that were used.

**Data collection methods.** Stringer (2014) noted that the task of the Look phase of action research process is to collect data that "enables researchers to extend their understanding of the experience and perspective of stakeholders..." (p. 101). The first cycle of action research, therefore, begins with qualitative data gathering that seeks to capture the stakeholders' views of the inquiry topic (Stringer, 2014, p. 101).

The data collection began with 15 RCWS club members completing the online survey on the inquiry topic. Stringer (2014) suggested that initially surveys offer a very limited scope of qualitative data and can often be heavily influenced by the researcher's biases (p. 118). To counter the effect of personal biases, I finalized the survey questions (see Appendix I) with the helpful feedback received from the executive board members (Sue & Ritter, 2007). To ensure respondents' anonymity, I requested the club secretary to e-mail the online survey to the club members for completion (Sue & Ritter, 2007).

Next, phone interviews with the external stakeholders followed. It was imperative to ensure that the designed interview questions did not include leading questions that could either promote the researcher's preconceived biases or implicitly identify the anticipated response for the interviewee (Roulston, 2011, pp. 79-80). Interviews stir participants to reflect on their experiences as they relate to the inquiry topic (Stringer, 2014, p. 107). One potential drawback with interviews is that certain questions may not elicit genuine responses, if the level of trust between the researcher and the participant is lacking (Roulston, 2011, p. 79). Interview questions (see Appendix G) also required piloting to ensure their effectiveness, and I consulted the project sponsor and the club secretary to receive objective feedback on the quality of questions that were used to generate responses from external stakeholders (Glesne, 2016, p. 106). In addition, I employed "the verbatim principle" (Stringer, 2014, p. 110) concerned with keeping the same words as were used by participants in order to transcribe recorded phone interviews and ensure accuracy of qualitative data obtained from external stakeholders.

After I collected qualitative data from the phone interviews with the external stakeholders and obtained survey results from RCWS members, I performed initial analysis of the gathered data that helped augment the questions for the focus group (see Appendix H) with the executive board of RCWS to include questions about the findings from the interviews and the survey. The advantage of a focus group method is that it provides the researcher with the collective input of the group that is uninhibited by "interpretive frameworks derived from researcher perspectives, professional or technical language, or theoretical constructs" (Stringer, 2014, p. 111). Still the researcher acts as the facilitator of the method, adapting a leadership style appropriate to given group dynamics and ensuring that all voices are equally heard in the process (Stewart, Shamdasani, & Rook, 2007). The main drawback with focus group research is the

absence of confidentiality given the group nature of the process, which may create reservations in both the researcher and the participants to bring up sensitive questions and answers (Morgan, 1997, p. 15). However, a focus group method is essential in organizational action research due to the dialogical nature of change, so that the discourse about the inquiry topic, as a socially constructed norm in the group, raises new ideas for group action (Morgan, 1997).

**Study conduct.** Upon completion of the ethical review, I held an information session with RCWS members on the nature of the action research process and the inquiry topic. I emphasized that participation in research is completely voluntary. In addition, I addressed the questions and concerns, associated with one's involvement in the research process. Ultimately, I attempted to highlight the benefits of the inquiry into member retention not only for RCWS in particular, but for Rotary as an organization. The information session served as the marketing kick-off for the project to inspire greater participation. Excluding myself as the internal researcher, the project involved all 22 members of RCWS and a sample of four external stakeholders selected using the snowballing principle (Stringer, 2014) from the external stakeholder groups identified in the systems analysis.

The inquiry began with the online survey (Appendix I), which was electronically sent out to fifteen club members by the club's secretary to measure their level of current interest in RCWS and its functions. Kraut (1996) observed that a survey is effective for identifying areas of concern, noting developing trends, and collecting input for future decisions, making it a viable tool for inquiry into enhancement of member retention at RCWS, especially in relation to the long-term viability of the club. Appendices A and F show the invitation to participate in a survey and the survey preamble that were e-mailed to participants by the club's secretary.

After the round of surveys was completed, I conducted telephone interviews with the external stakeholders about their experience with RCWS. The advantage of an interview lies in the depth of data that can be obtained in the process (Gillham, 2000, p. 11). I utilized the semi-structured approach to conducting interviews with the external stakeholders, which, according to Gillham (2000), is "a fraction more systematic" (p. 7) than a conversation, but still less formal than a structured interview. Roulston (2010) observed that semi-structured interviews allow the interviewer to guide the interaction with open-ended questions to encourage genuine disclosure unimpeded by the interviewer's biases and elicit additional details with the use of closed questions (p. 15). Appendix C includes the invitation to participate in a phone interview that I e-mailed to each participant. Appendix D provides the research consent form for an audio recording of the interview that I also e-mailed to each participant for signing and, subsequently, received a signed copy from each. I used the verbatim principle to transcribe each interview using the audio recordings and e-mailed transcripts of interviews to each respective participant for validation (Stringer, 2014).

The findings from interviews with external stakeholders and the survey data were analyzed and presented to the executive board members during a focus group. Appendix B includes the invitation to participate in a focus group that I e-mailed to each participant, while Appendix E provides the consent form that I asked each participant to sign prior to discussion. Since the executive board will be instrumental in implementing the recommendations and conclusions resulting from the inquiry, a focus group is suitable for establishing a sense of collaboration and ownership around the collected data (Morgan, 1997, p. 54). Additional points derived from the focus group informed the data analysis and resulted in new perspectives. The

findings from surveys, telephone interviews and the focus group were integrated with the literature review to form informed conclusions about the inquiry topic.

Having formulated conclusions, I proceeded to share the action research process and ensuing recommendations with the project sponsor. As a Rotary member and an executive board member, I had a personal interest in helping the club discover ways in which member retention could be enhanced. Ownership of reached conclusions and subsequent implementation of action steps will be assumed by all executive board members who will act collaboratively to bring about systemic change. Although not a part of the inquiry process, the world cafe session will verify validity of reached conclusions and equip the club members to set in motion the recommendations produced in the course of the inquiry.

**Data analysis and validity.** The objective of the interpretive framework in action research, according to Stringer (2014) is to locate what he termed "units of meaning", properly defined as "statements that have discrete meaning when isolated from other information" (p. 142). The process of data analysis began with identification of themes with the use of several techniques. Ryan and Bernard (2003) advised that the initial task of theme discovery should produce as many themes as possible. The ensuing responsibility for the investigator then is to determine "which themes are most salient and how themes are related to each other" (p. 103). The first technique, called "key words in context" (Ryan & Bernard, 2003, p. 97), allows the researcher to "identify key words or phrases and then systematically search the corpus of text to find all instances of each key word or phrase" (p. 97). The second technique, called "linguistic connectors" (p. 91), focuses on words and phrases that signal "causal relations" and "conditional relations" in the text (p. 91). The third technique involved defining "similarities and differences" (p. 91) between expressions of participants, which are also emergent themes (p. 91). Lastly, the

processing technique of "cutting and sorting" (p. 94) was used to organize and group similar quotes in preparation for coding.

In the first cycle of coding, words were assigned to identified themes to make sense of collected data, while the second cycle of coding involved classification, integration and synthesis of data into concepts for subsequent interpretation (Saldana, 2016, pp. 67-68). While coding data, I assumed the posture of "theoretical sensitivity" (Grbich, 2013, p. 261), drawing similarities in my mind between emergent themes in my analysis and those articulated in the literature review. In addition, I created a codebook in which I gave each major coded category its own page and listed corresponding coded sub-categories with a written explanation for each (Glesne, 2016, p. 198).

An act of interpretation is always offered through the prism of one's understanding of the issue. Stringer (2014), however, cautioned that those engaged in interpretive activities "must 'bracket' their own understandings, intuitions, or interpretations as much as possible and focus on the meanings inherent in the world of participants (p. 139). Coghlan and Brannick (2014) similarly stated that internal researchers need to test their assumptions and remain open to feedback to prevent personal experiences and sense-making techniques from impinging on the data collection and interpretation (p. 31). In order to limit the impact of individual preconceptions, I applied the verbatim principle (Stringer, 2014) to interpretation of qualitative data, thereby giving special attention to the concepts and words voiced directly by the participants (p. 140). As an internal researcher, I was aware of potential influences from personal biases and interpretive framework. In order to ensure credibility (Stringer, 2014) of my research, I utilized "triangulation" (Glesne, 2016, p. 152) technique to allow participants to challenge my thinking and critique my analysis of data. To warrant confirmability of my analysis and findings,

I retained interview transcripts, survey data, audio recordings, the codebook and notes related to the study (Stringer, 2014, p. 94). Furthermore, trustworthiness (Glesne, 2016) of the inquiry project was achieved through the use of member checking technique (Stringer, 2014), as members of the executive and the project sponsor were provided with opportunities to review collected data.

### **Ethical Issues**

According to Hilsen (2006), action research warrants ethical consideration of three particular areas, identified as "human interdependency, co-generation of knowledge and fairer power relations" (as cited in Coghlan and Brannick, 2014, p. 146). Ethical review is a mandatory component of social research, and this particular study received clearance from the ethical review board at Royal Roads University. In the course of this study, specific efforts were undertaken to ensure that participants possessed familiarity with the inquiry and continually offered their informed, voluntary consent.

The Tri-Council Policy Statement, Version 2 (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, & Social Sciences and Humanities Research Council of Canada, December 2014) contains three core principles that describe the nature of ethical research. The three principles, as articulated in TCPS2, target "the two main goals of providing the necessary protection of participants and serving the legitimate requirements of research (p. 9).

Respect for persons (Canadian Institutes of Health Research et al., 2014) is primarily concerned with respect for the person's autonomy, which is illustrated in "giving due deference to a person's judgment and ensuring that the person is free to choose without interference" (p. 6). This particular principle was complied with through distribution of anonymous online surveys

and written consents with an opt-out clauses for both the focus group and the interviews, as indicated in the corresponding Appendices sections.

Concern for welfare (Canadian Institutes of Health Research et al., 2014), when contextualized within the framework of the current inquiry project, has to do with "privacy and the control of information about the person[s]" (p. 7) that are participating in the research. Anonymity of the online surveys, as well as the destruction of interview transcripts upon conclusion of the research process ensure that this principle is considered.

The principle of Justice (Canadian Institutes of Health Research et al., 2014) entails treatment of all participants with "equal respect and concern" (p. 8). In the context of this inquiry project, justice meant giving all stakeholders the equal benefit of the research process by ensuring that all voices were given equal consideration in shaping responses to the inquiry question. The research project, as constructed, took careful consideration of the internal and external stakeholders and used various methods of data collection to incorporate their voices into the decision making framework.

Given the egalitarian nature of Rotary as an organization and my personal vested interest in enhancement of member retention at RCWS, the conflict of interest was not identified as an existing factor that could potentially create an ethical challenge.

### **Chapter Summary**

In this chapter, I explored the dialogical nature of action research and the appreciative inquiry stance that shaped the outlook of this inquiry. Attention was also given to data collection methods and the selection of participants for each respective method. After I proceeded to describe the inquiry process and outline data analysis in some detail, the chapter was concluded

with a sub-section on ethical considerations and my efforts to mitigate ethical issues. The next chapter presents the inquiry project findings and conclusions.

### **Chapter Four: Inquiry Project Findings and Conclusions**

This chapter presents the findings and conclusions of the inquiry. In addition, this chapter identifies the scope and limitations of the study. The following inquiry question has been explored: How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention?

The sub-questions that informed the overarching inquiry process were:

- 1) What are the factors that influence membership attraction and retention for RCWS?
- 2) What member retention efforts currently exist at RCWS and are they effective? If so, how could these be strengthened and augmented?
- 3) What are the barriers to member retention at RCWS and how can these be reduced?
- 4) What other membership retention strategies can be implemented and who needs to be involved?

#### **Study Findings**

In this section, the findings are supported with anonymous citations from phone interviews, the survey's numerical data and free response components, and summarized excerpts from the focus group. Whenever interview participants were quoted, the participant codes of I1 through I4 were assigned to each direct quote. Summarized excerpts from the focus group were labelled as FG and responses obtained from the survey were referenced as S (See Appendix I). The coding utilized protects identities of study participants and ensures their anonymity.

In the course of this inquiry, participants provided their insight into enhancement of current member retention practices at RCWS. Survey participants were asked to assess their levels of contentment with the club's culture and structure, as well as to evaluate their overall level of satisfaction with their membership at RCWS. The interviewees shared about their

positive experiences working alongside RCWS in various humanitarian efforts and commented on the nature and quality of their volunteer experience. The focus group participants, who were all executive board members with RCWS, further added to the narrative of positive working experience with the club and discussed the meaning they find in doing the humanitarian work through the structure of RCWS. They also added perspectives on engagement of past, current and prospective club members, and depicted the desirable version of RCWS that they would like to be a part of in the near future. Important themes emerged as the participants shared their experiences during the interviews and the focus group and were further substantiated with the results of the survey. The following six findings capture the themes emerging from the inquiry:

1. Inquiry participants characterized their experience with RCWS as generally positive.
2. Participants named potential barriers to member retention and identified opportunities to overcome them.
3. The club's involvement of its members could be improved.
4. Participants value interpersonal connection and have given indication that the culture of RCWS could be improved.
5. Participants desire the opportunity to actualize personal humanitarian motivations through RCWS.
6. Participants want to have a direct experience of the results of their humanitarian efforts.

**Finding 1: Study participants characterized their experience with RCWS as generally positive.** Of 15 club members who voluntarily completed the survey, eight stated that they are "satisfied" with their membership at RCWS, while six noted that they are "somewhat satisfied". No members indicated that they were dissatisfied with their membership at RCWS.

Another indication of the generally positive experience with RCWS among the inquiry participants came from the survey responses made to the statement, "I feel welcome in my club". As the results demonstrated, 80% of club members replied with "agree" and the remaining 20% replied with "somewhat agree".

Reflecting on the question, "what has been your working experience with RCWS", the interview participants spoke of the club in positive terms. I1, a former club member who currently assists RCWS with designing promotional material for the club's fundraising efforts, applauded the club's level of organization in providing her with the content for each event in a timely manner. She assessed her working experience with RCWS as "very positive and very streamlined, very smooth now" (I1). Another participant and a former member described RCWS members as a "good group of people" (I2) and noted that the club is "a place where you like to be with other people" (I2). Similarly, I4, also a former member, characterized RCWS as a "warm and welcoming club". Furthermore, another interviewee, who is also a loyal supporter of the club, stated that he was always "very impressed by the quality of the leadership" (I3) at the club. He said, "I trust Rotary to make sure that the money and the effort goes to what they've designated" (I3).

As evidenced above, the inquiry participants felt relatively strongly about contentment with membership at RCWS and described it as a welcoming group. These sentiments were further validated by the focus group participants who praised the cheerful attitudes of members and their warm disposition (FG). Several interview participants specifically celebrated the quality of club's leadership reflected in the high level of organization (I1) and trustworthy decision-making (I3). All these components affirmed the generally positive experience of the inquiry participants with RCWS.

**Finding 2: Participants named potential barriers to member retention and identified opportunities to overcome them.** In response to the survey question number one, "Why did you join the Rotary Club of West Shore," 12 members selected "opportunities for fellowship" and "opportunities for making a difference locally", while eight members chose "opportunities for making a difference internationally" (See Figure 3).

Reason for Joining	Number of Members
Personal growth	4
Professional development	1
Prestige	1
Networking	5
Fellowship	12
Local service	12
International service	8
Other	1

*Figure 3. Aggregated responses to survey question number one*

The results demonstrate that for 15 current members, the two major reasons for joining RCWS were fellowship and local humanitarian service. However, only 60% of club members fully agreed with the statement, "The members in my club care about one another", and only 60% fully agreed with the statement, "Through my club I make a difference in my community". It appears that among current members, the level of satisfaction with the quality of fellowship and local humanitarian service can be improved.

Interviews with external stakeholders, all of whom are past members, yielded additional insights with respect to barriers to retention. Two apparent obstacles were the day and time when the club meets. I1 stated, "I haven't really had a chance to be a member anymore because of the

time when Rotary club met..." Commenting on her past membership, I2 similarly offered, "I think, like I said, economically, if I could not be having to work on Fridays and could be at the club, I'd do that, but I can't at this present time". Another participant, a former member, also commented on the seeming lack of time in personal schedule, saying, "I just know I have too much work to do" (I3). He further added, "I know if I took something else on, something would suffer" (I3). Alluding to the challenge of managing a personal schedule, I4, who also held the district level position for Rotary International, concluded, "People are pretty committed to the time of day that works for them". She also interestingly observed, "I think people are somewhat more flexible on 'day of the week' than they are on 'time of day'" (I4).

The focus group stimulated conversations about potential opportunities to overcome barriers to retention. In response to the question, "How are we engaging members who leave", all focus group participants acknowledged that RCWS has not done enough (FG). A suggestion was made to invite all past members to the summer BBQ event to ensure that they remain connected to the fellowship of RCWS (FG). Participants also discussed conducting informal exit interviews with those leaving RCWS to discover exact reasons why members choose to leave (FG). An observation was made that prospective members need to be informed about the costs associated with membership ahead of time, while active members who offer great contribution to RCWS should receive bursaries in an event of a personal financial struggle (FG). In response to the question "How can we generate the feeling of engagement with RCWS", participants talked about making RCWS weekly meetings more unique and less routine (FG). The latter response had a direct correlation with the survey response to the statement "Club meetings are a good use of my time", to which only 33% of members gave their full agreement. Further, participants also

discussed keeping a limited number of humanitarian projects in order to increase enjoyment of the process and decrease chances of burnout among active members (FG).

An interesting detail emerged when in the course of the focus group a statement was made that "international projects are close to [RCWS's] heart". The statement was incongruent with the survey results, which showed that active members favour local projects over international ones (See Figure 3). The incongruence can be a pointed example of the limited knowledge that RCWS executive board may have of its individual members' aspirations. However, there is also a promising picture for RCWS in terms of future recruitment opportunities. In response to the statement, "I am proud to be a member of my club and I would recommend it to my connections", 87% of participants gave their full agreement (S). In addition, all four interviewees stated that they would recommend RCWS to their connections without any hesitation.

**Finding 3: The club's involvement of its members could be improved.** A few survey responses demonstrated that RCWS could benefit from performing an initial screening of its members. In response to the statement, "Service projects are well planned and take full advantage of my skills and availability", only 27% of participants offered their full agreement (S). The focus group participants further amplified the notion of limited familiarity with members' skills and availability, stating that job descriptions should be designed and member lists established to help RCWS members become involved in meetings (FG). Furthermore, only 60% of participants fully agreed with the statement, "Service projects undertaken by my club have meaning for me" (S). The results indicate that there is untapped potential within the human capital of RCWS and, therefore, additional knowledge of the human capital is necessary to make the membership experience fully meaningful.

Survey results also demonstrated that RCWS can strengthen communication with members on an individual basis. In their responses to the survey question, "Consider the club's level of success in involving its members...", participants were asked to evaluate four statements and assign a grade on a scale of 1 to 5 (one being the highest and five being the lowest) to each. While no fives were assigned to any of the four statements, the statement, "My club proactively seeks the input of its members", received a relatively even distribution of assigned grades one through four, suggesting that some members feel unheard. 40 % of participants assigned grades three and four to the statement, "My club communicates well with its members", suggesting that RCWS could be more intentional and effective in its communication. 47% of participants assigned grades three and four to the statement, "My club hears the members' ideas and implements them", showing their perceived limitation in being able to shape the direction of RCWS. The remaining statement, "My club is attentive to the needs of its members", had 0% of participants assigning it a five and 40% of participants assigning it grades three and four, which is an indication that RCWS can generate a more acute awareness of its members' needs.

**Finding 4: Participants value interpersonal connection and have given indication that the culture of RCWS could be improved.** In the course of interviews and the focus group, the words used to describe interpersonal connections the most were "comradery" and "others". In describing RCWS, I1 noted that "it's really all about comradery and it is really also about learning too". I2 posited a similar attitude towards the value of developing interpersonal connections, stating, "I very much enjoyed the comradery with the other members..." In speaking on his experience with RCWS, I3 applauded the "good comradeship" at the club and stated that he enjoyed "[working] with the other members at the Rotary..." A similar portrait of the value of interpersonal connection unfolded during the focus group in the responses to the question, "How

might we do things differently to help members feel more appreciated?" Participants discussed the importance of creating opportunities for personal interactions among the members and organizing social activities to create friendships (FG). They also highlighted the social benefit of being involved in humanitarian work alongside other "like-minded people" (FG).

Survey results indicated, however, that interpersonal connection at RCWS can be grown further, as evidenced in the responses to the question, "Consider the culture of our club and indicate your level of agreement with the following statements". Only 20% of active members fully agreed with the statement "I have mentored a new member". In addition, only 7% fully agreed and 47% somewhat agreed with the statement, "My club reflects the demographics of my community", which also resonated with the focus group participants who voiced their shared desire to see a more diverse membership at RCWS (FG). It appears as though the depth of interpersonal connection may also be affected, as only 67% of participants fully agreed with the proposition, "I establish valuable relationships through my club" (S).

**Finding 5: Participants desire the opportunity to actualize personal humanitarian motivations through RCWS.** In conducting interviews with the external stakeholders, who also happened to be past members of RCWS, it was interesting to observe that the incentive to pursue a membership with RCWS for several participants had to do with a burning humanitarian passion. Three participants saw RCWS as the vehicle through which that passion could generate visible action. I1 talked about her specific interest in becoming involved with major fundraising initiatives at RCWS,

I think if I were to get involved with Rotary of West Shore, I would want... Um... To probably be part of... Probably one of the larger events... That would be more what I would be interested in doing... Because I am experienced at it. I've done some major

galas and events for other organizations before, so I can bring some of my abilities to...

You know, the forefront (I1).

It is evident that for I1 long-term participation with RCWS would be contingent on how well she is able to exercise her prowess with organizing major functions within the structure of the club's humanitarian effort. Meanwhile, I2 proceeded to identify the common interest in promoting literacy in public schools, which she shared with the club, as the reason for her participation,

I think, basically, that the club was interested because it's Rotary... Is literacy, and so I think it was a big part, a focus, for the club itself, and definitely one for me, so it married what Rotary, in general, plus Rotary West Shore, valued was children and literacy. So it definitely, I thought, was a good project for us (I2).

I2 concluded by saying that in her working experience with RCWS, "getting the reading program going was probably [her] most enjoyable moment". Furthermore, I3 discussed his commitment to promoting democracy in the places of the world, where the democratic process is pushed to the margins of society. He spoke about supporting a girl's school in Malawi, which is regularly funded by RCWS,

I think the idea of a girl's school in a place like Malawi is very brave. It deserves support. Democracy is a very hard thing to keep running. It's hard in countries where we believe we have democracy, it's very tough. So in a place like Malawi, I can only imagine it's much tougher (I3).

I3 also noted that in his effort to support the democratic principle of gender equality, RCWS "gave [him] information", "gave [him] some direction", and "some structure to work with" in order to actualize his humanitarian motivation.

A common thread in all the narratives is that individual participation in RCWS is either driven by the possibility to exercise a personal strength for a humanitarian cause or by the opportunity to champion a personal social concern through the framework of the club's humanitarian effort. This insight obtained from former members of RCWS who remain active supporters of the club is especially vital in light of the survey responses obtained from participating active members. Only 53% gave their full agreement to the statement, "My club takes advantage of my talents and skills", showing that some members feel that their core strengths are not being fully utilized by the structure of RCWS. In addition, only 60% strongly agreed that they made a difference in the local community through their involvement with RCWS, while only 53% expressed full conviction about making a difference in the world.

**Finding 6: Participants want to have a direct experience of the results of their humanitarian efforts.** Focus group participants expressed unanimous interest in receiving positive feedback from beneficiaries of humanitarian service performed by RCWS (FG). They further discussed the importance of seeing actual signs of improvement in the condition of individuals that have been aided by the club's humanitarian effort (FG). One interesting insight shared in the course of the focus group was that Rotary members are typically "sustained by past Rotary experience", and their future involvement, therefore, is fuelled by an apparent sense of accomplishment (FG). It is noteworthy, however, that of the current members who participated in the survey, only 67% agreed that service projects undertaken by RCWS effectively meet human need. While the latter survey response does not necessarily deem the current humanitarian efforts of RCWS ineffective, it may point to a general lack of knowledge of direct impact that individual contributions of members have on beneficiaries in the context of a humanitarian project.

Similarly, interviewees alluded to the value of experiencing the outcome of personal involvement firsthand. I1 spoke of the desire to witness "the fruits of [her] labour" in the course of planning and running an event "all in hopes that [the event] is successful". I2 shared personal passion for "hands-on" involvement in humanitarian work and, subsequently, voiced regret over inability to have direct encounters with beneficiaries of that work,

That's the only thing that I miss, being able to have gone to Africa... Or whatever, to Malawi... I never saw it first-hand or some of the stuff, putting up a playground or the reading program, or some of the other stuff that we've helped to start up in the community... That stuff we can see, touch, and feel, locally, and see we helped do that. Those are the things that are kind of nice, especially to try and get somebody else involved (I2).

Furthermore, I3 described all RCWS projects as "important because they all build relationships", emphasizing the connection that emerges between the club members and beneficiaries. The connection with beneficiaries, as I1, I2 and I4 all agreed, is vital for generating a sense of reward from participation in RCWS, which, in turn, comes from seeing the impact of personal contributions offered through the framework of RCWS on the human condition.

### **Study Conclusions**

Using the analysis of the study findings, I offered four conclusions to support RCWS in discovering ways in which current member retention strategies can be enhanced to ensure the organization remains effective in providing humanitarian service. The following statements articulate the conclusions that have been reached:

1. RCWS needs to be adaptive to members' attributes, availability and motives for volunteering.

2. Member management practices need to be more intentional towards the existing human capital.
3. Members have a desire for increased socialization.
4. RCWS needs to establish a stronger network between club members and beneficiaries to generate a clear display of the outcome and impact of member contributions.

This section explores the four conclusions in detail and establishes a link with the literature review to demonstrate how the research findings find their place within the theoretical field.

**Conclusion 1: RCWS needs to be adaptive to members' attributes, availability and motives for volunteering.** As survey results demonstrated, only 53% of the current club members fully agreed that RCWS takes complete advantage of their skills and only 27% felt that the club takes advantage of their availability (S). In addition, only 60% of the current club members found personal fulfillment in the service projects undertaken by RCWS (S). All four interviewees, who also happened to be former RCWS members, commented on their inability to retain membership due to the time and day of club meetings, which interfered with their professional responsibilities.

The findings above elucidate potential barriers that can inhibit member retention efforts. It has been noted that non-profit organizations are responsible for cultivating the kind of environment that supports and encourages volunteers (Bussell & Forbes, 2002; Hager & Brudney, 2004). Schie et al. (2015) also deemed "the organizational context to be crucial for successful volunteer management" (p. 1572), suggesting that the challenge for non-profits lies in alleviating the pressure on volunteers due to its negative effect on their motivation (p. 1572). It is imperative that non-profits develop an understanding of what exactly motivates their volunteer

contingent. Bussell and Forbes (2002) drew attention to the presence of either an altruistic disposition or an egoistic orientation in volunteer behaviour that ultimately drives volunteer participation (p. 249). As discussed in the literature review, Schie et al. (2015) elaborated on the latter finding to suggest that individuals possess either a "general self-determined motivation" (p. 1574), reflected in a strong belief in a particular cause, or an "organization-focused self-determined motivation" (p. 1574), inspired by acceptance of the organizational purpose. Such an embrace of either an internal motivation for humanitarian engagement or an external motivation caused by one's alignment with the organizational mandate is what constitutes volunteer diversity (Haivas et al., 2014, p. 329). The primary task facing non-profits is to get to know the individual profiles of their volunteers in order to match individual motivations and abilities with appropriate tasks within the organizational framework (Hallmann & Harms, 2012; Wisner et al., 2005). Volunteers are more likely to maintain long-term engagement with an organization, if they possess the freedom to choose projects for participation and apply their abilities to help the organization achieve its goals (Haivas et al., 2013). It is precisely the opportunity to satisfy the innermost need for volunteering and to exercise control over one's involvement that constitute a meaningful experience (Houle, Sagarin, & Kaplan, 2005, p. 343). Several studies concluded that a perception of autonomy in one's involvement with the organization positively influences one's decision to remain with an organization (Hidalgo & Moreno, 2009; Lee, Won, & Bang, 2014; Millette & Gagne, 2008).

**Conclusion 2: Member management practices need to be more intentional towards the existing human capital.** As Finding 3 demonstrated, improvement in the way RCWS involves its members may be necessary. Survey results indicated that some members feel their voices are unheard and perceive limitation in their ability to shape the direction of RCWS (S). In

addition, survey participants felt that RCWS can become more proactive in communicating with its members and, in the process, generate a more accurate understanding of its members' needs (S). The latter discovery echoes the conclusion reached by Hager and Brudney (2004) who poignantly noted that volunteer retention is contingent on the non-profit entity reaching a proper balance between attention to organizational and volunteer needs (p. 12).

Successful integration of the human capital into the structure of the organization is dependent on the quality of interactions between non-profit leaders and followers (Catano et al., 2001, p. 256). Scholarship has demonstrated that a relational approach to leadership in the non-profit sector allows the organization to strike a better balance between attending to individual stances of its volunteers and retaining a focus on its objectives (Herman & Renz, 2008; Jager et al., 2009; Stirling et al., 2011). In addition, transformational leadership style has been identified as most favourable for cultivation of a climate suitable for enhanced volunteer retention due to its investment in development of the human capital and subsequent integration of the human capital in decision-making processes in the organization (Dwyer et al., 2013). When the organization is attentive to the needs and interests of its human capital, volunteers feel more empowered and exhibit a greater commitment to the organization (Posner, 2015; Schneider & George, 2011).

Research on volunteer retention in the non-profit sector has explored the concept of a "psychological contract" (PC) to comprehend the volunteer-organization relationship (Farmer et al., 1999; O'Donohue et al., 2015). At its core, PC presumes that volunteers have certain expectations of the organization in return for their contribution of time, effort and expertise (Farmer et al., 1999, p. 362). The concept of PC underscores the importance of uncovering those expectations by offering space for a volunteer voice in the non-profit sector. One important

finding is that volunteers derive their sense of identity from their experience with a non-profit organization, and, as a result, they often carry an established sense of identity shaped by previous volunteer experiences, whenever they enter a new organization (Pauline, 2011, p. 23). It becomes imperative for volunteer administrators to understand identities of their volunteers through face-to-face contact (Bortree & Waters, 2014; Pauline, 2011). Giving space for a volunteer voice in organizational decision-making is properly understood as an empowering act, which strengthens the commitment of volunteers to the organization (Bortree & Waters, 2014, p. 229).

**Conclusion 3: Members have a desire for increased socialization.** As discussed in Finding 4, interview participants referenced comradery with other members as an important highlight in their experience with RCWS. The executive board members who participated in the focus group also stressed the value of organizing activities that would encourage members to socialize and cultivate friendships with each other (FG). In addition, survey results pointed to fellowship as one of the two top reasons for joining RCWS among the current club members, however, only 67% of members agreed that they have successfully established meaningful relationships through the club (S).

The above discoveries mirror conclusions found in literature. According to Self-determination Theory (SDT), which has been utilized to understand volunteer motivation in the non-profit sector, one of the three basic psychological needs is to form meaningful connection with others (Haivas et al., 2013, p. 1870). An individual is an integral part of a given community, whose ability to function effectively is dependent on the quality of relationships with others in that community (Shye, 2010). As Shye (2010) has demonstrated through a Systemic Quality of Life Theory, individuals are proactive about shaping their social environment and searching for opportunities to gain a "sense of belonging to community" (p. 198).

As noted in Finding 4, only 20% of current members indicated that they took the initiative to mentor a new member (S). Woodill (2008) suggested that non-profit organizations should devote more attention to "social inclusion and community development" (para. 14), which is a frequently neglected area in the non-profit sector due to its excessive preoccupation with quick volunteer recruitment to fill available positions. Jensen and McKeage (2015) also advised on making "intentional plans that provide volunteers with the opportunity to socialize and build community with staff and other volunteers" (p. 183). Boezeman and Ellemers (2009), commenting on the importance of "relatedness needs" (p. 900), noted that the degree of social integration of volunteers into a non-profit organization has a direct impact on "their job satisfaction and intentions to remain" (p. 900). Furthermore, established social networks of volunteer capital can be used by non-profit organizations as a promotional display of a specific internal practice that allows volunteers to garner individual support from the organization and develop a sense of belonging (Boezeman & Ellemers, 2008, p. 1024). Achievement of an effective socialization dynamics within a non-profit entity is, therefore, a plausible marketing tool for attraction of those aspiring to locate a community of their own. In the non-profit sector, social ties are deemed highly effective for attracting prospective members and volunteers (Hager & Brudney, 2015; Hustinx, Cnaan, & Handy, 2010; Lee & Brudney, 2012).

**Conclusion 4: RCWS needs to establish a stronger network between club members and beneficiaries to generate a clear display of the outcome and impact of member contributions.** As evidenced in Finding 6, participants wanted to have the opportunity to hear positive feedback from beneficiaries of humanitarian service undertaken by RCWS and witness visible signs of improvement in the condition of those aided by the work (FG). The fact that only 67% of survey respondents agreed that service projects performed by RCWS effectively meet

human need could be an indicator of shared unfamiliarity with the ways RCWS's humanitarian efforts have had impact (S).

In their review of social issues and policy implications for volunteer administration, Snyder and Omoto (2008) stressed the importance of seeing connections that volunteers form with fellow volunteers, staff, and beneficiaries (p. 17). They argued that volunteering "[fosters] a sense of community" (p. 17), which resonated with an observation made by I3 that RCWS's projects ultimately "build relationships" with beneficiaries. Once a sense of community with beneficiaries is established and the connection to that community expands, the commitment to participation in that community also grows (Snyder & Omoto, 2008, pp. 17-18). An analogous conclusion was reached by Shantz et al. (2014) in their study of the relationship between volunteers and beneficiaries, "Interventions that provide highly engaged volunteers with an opportunity to interact with beneficiaries or to see the direct impact of their work could greatly enhance the time that [organizations'] volunteers choose to dedicate to volunteer activities" (p. 691). The latter conclusion was validated by I1 and I2, who in their interviews underscored their desire to observe the outcome of personal volunteer contributions. In fact, I2 further noted that firsthand experiences with the outcome of RCWS's humanitarian work are helpful "to try and get somebody else involved". As Valeau et al. (2013) also contended, a "sense of obligation to meet clients' needs" (p. 92) results in "volunteers' satisfaction with their work" (p. 92) and contributes positively to volunteer retention (p. 92).

**Summary of conclusions.** As this section demonstrated, the review of pertinent academic literature provided in Chapter Two substantiated the conclusions reached by this inquiry into enhancement of member retention at RCWS. First, RCWS can benefit from becoming more adaptive to members' attributes, availability, and individual motives for

volunteering. Second, current member management practices assumed by RCWS can be more intentional in heeding individual volunteer voices, resulting in a more relational approach to volunteer administration. Third, RCWS members have a strong desire for increased socialization, which is seen as a positive contributor to volunteer satisfaction with the organization. Fourth, RCWS needs to provide its members with opportunities to observe the outcome of their efforts and form relationships with beneficiaries, which will allow members to discover meaning and satisfaction in their work.

### **Scope and Limitations of the Inquiry**

There are five particular limitations of this action research inquiry that should be noted. The first one has to do with the scope of the study. Given that Rotary is an international organization, it is imperative to take the locale of this study into consideration when discussing the applicability of the findings of this research project. Every locale presents its socio-economic reality and established cultural norms. In that sense, RCWS represents a distinct cross-section of Rotary in the North American context and should be understood as such. Whether the study findings are appropriate for other Rotary International organizational contexts is left to the discretion of readers.

Secondly, the review of literature could benefit from additional focus on membership associations, which RCWS would also fall under. Although Rotarians are volunteers, they are properly conceived of as members who join the organization and contribute voluntarily with their skills and resources. Hager (2014) has made a compelling case that association members are unique volunteers in that they join organizations in order to co-produce results in which they have personal interest. Hence, from an organizational standpoint, there could be both a theoretical and a practical distinction between member retention and volunteer retention.

Thirdly, it is imperative to note the impact of reflexivity on this final product. Reflexivity is the idea that the person's interpretation is inherently biased, and, therefore, that bias will inevitably be represented in the final output. As a researcher internal to RCWS, I possessed a perspective on the existing organizational dynamic within RCWS. Throughout the project I attempted to mitigate influences of personal bias through discussions with the Project Sponsor and members of the executive, especially in relation to data analysis and findings. Recommendations for RCWS in their draft form were considered and endorsed by the Project Sponsor before they were presented in this paper in their final form.

Fourthly, a legitimate question can be raised as to whether phone interviews were the best approach to obtaining qualitative data for this study. Given the particulars of my professional commitment and the possibility of a move to another geographical location, I had to opt for phone interviews to ensure that a possible move would not cause a disruption to this inquiry. It was difficult to get participants for phone interviews, and I would have preferred to have more than four to increase the richness and diversity of qualitative data. The difficulty to get participants was likely associated with the trust factor, which a face-to-face contact could potentially minimize.

Lastly, in my analysis of interview transcripts I noted several instances where I could have asked more open-ended questions to obtain more descriptive data from interview participants (Roulston, 2011, p. 85). At times I settled for closed questions or asked questions with anticipated responses, thereby influencing interviewees to answer in a particular way. (Roulston, 2011). There is a possibility that important data points were left unsaid because of the way I conducted all interviews. This self-critical reflection is the learning I take away from this inquiry process in preparation for future interviews.

**Chapter Summary**

In this chapter I outlined the study findings and proceeded to explore each one in some depth. The narratives offered by participants painted a positive picture of RCWS and demonstrated a general sense of pride in the organization.

The results of the inquiry also yielded some perspectives on how certain organizational behaviours can be grown to enhance member attraction and retention. This includes becoming more adaptive to identities of members, making management practices more intentional towards the voices and needs of existing members, creating opportunities for socialization, and building relationships with beneficiaries. Recommendations provided in the next chapter reflect these conclusions and suggest ways in which the inquiry results can be utilized by the organization to address the question of member retention.

### **Chapter Five: Inquiry Implications**

This chapter provides a synthesis of the research findings, conclusions, and relevant literature to offer RCWS a set of recommendations to assist with enhancement of member retention at the club. This chapter also includes a discussion of organizational implications, outlines trajectories for future research, and ends with a brief summary of the report.

This action research project explored the following inquiry question: How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention? In addition, the sub-questions that informed the overarching inquiry process were:

- 1) What are the factors that influence membership attraction and retention for RCWS?
- 2) What member retention efforts currently exist at RCWS and are they effective? If so, how could these be strengthened and augmented?
- 3) What are the barriers to member retention at RCWS and how can these be reduced?
- 4) What other membership retention strategies can be implemented and who needs to be involved?

#### **Study Recommendations**

The recommendations offered in this section evolved from the study findings and relevant literature. Stringer (2014) noted that the feeling of ownership is generated when individuals feel they possess the power to shape the very processes in which they participate (p. 31). In order to encourage ownership of the recommendations, I included the Project Sponsor and members of the executive in personal discussions about the outcomes of the inquiry. Once the recommendations were drafted, I proceeded to discuss them with the Project Sponsor and several executive board members to seek their feedback on each. Discussions with the Project Sponsor and members of the executive regarding the findings and subsequent recommendations

reflected the interactive nature of action research, whereby collective effort is used to co-generate knowledge relevant to the inquiry (Coghlan & Brannick, 2014, p. 48). The focus group with the executive board members was used to reflect on the initial data and record observations that could potentially form practical steps aimed at enhancement of member retention at RCWS. Consequently, the group observations assisted in the formulation of the recommendations. Therefore, the recommendations are guided by the inquiry sub-questions and reflect the narratives and perspectives voiced by the internal and external stakeholders. The following are the recommendations pertinent to the inquiry question:

1. Perform screening of incoming and current members to determine their individual motivations, expectations, and attributes.
2. Enhance communication strategy with the current members.
3. Create fellowship opportunities for current and prospective members.
4. Establish a social network between club members and beneficiaries.
5. Encourage storytelling to celebrate achievements and inspire participation from prospective members.

It is anticipated that these recommendations, while rooted in relevant literature, will enable RCWS to enhance its existing member retention processes and facilitate an organizational environment of inclusivity with an attunement to individual voices and attributes represented in the existing human capital. Below the recommendations are developed in greater detail.

**Recommendation 1: Perform screening of incoming and current members to determine their individual motivations, expectations, and attributes.** Survey results showed that only 53% of the current members felt that their skills and talents were properly used by the club (S). Despite the overall positive view of their experience at RCWS, only 60% of the current

club members agreed that the humanitarian efforts assumed by RCWS carry personal meaning for them (S). As evidenced in the literature, the attitudes of current members reflected in the survey outcome raise the need for a proactive organizational approach to supporting and encouraging volunteer participation (Bussell & Forbes, 2002; Hager & Brudney, 2004; Schie et al., 2015). As Hager and Brudney (2004) observed, "[r]etention appears to be very much a product of what charities do directly to their volunteers" (p. 9).

Kouzes and Posner (2012) contended that individuals who are intrinsically motivated by a deep burning passion or interest will "keep working toward a result even if there's no reward" (p. 114). Kwok et al. (2013) reached a similar conclusion in their study, suggesting that satisfaction with a volunteering experience is directly connected to fulfillment of individual's intrinsic motivations (p. 1326). In addition to specific interests or passions that characterize one's intrinsic motivations, individuals also possess such psychological needs as respect, recognition, belonging, autonomy, personal growth, and meaning (Stallard & Pankau, 2008, p. 20). An organizational climate can be described as having human value, when its constituents are treated with respect, appreciated for their individual contributions, and supported in achieving individual potential (Stallard & Pankau, 2008, p. 19).

Organizations in the non-profit sector can benefit from matching the skills of volunteers to specific job profiles through the use of an initial screening process that would allow organizations to decipher individual volunteer motivations and skills (Hager & Brudney, 2004; Shin & Kleiner, 2003; Ward & McKillop, 2010). Garner and Garner (2011) emphasized the importance of discovering volunteer motivation "from the beginning of the volunteer-organization relationship" (p. 825) through an intake questionnaire or interview to facilitate a better fit between individual expectations and organizational needs. Furthermore, creation of a

meaningful experience in a volunteer commitment is rooted in the recognition of individual motivational profiles as determinants of volunteer diversity (Haivas et al., 2014, p. 329).

Organizational structures that adapt to unique motivations of their volunteers augment their effectiveness, satisfaction, and longevity of involvement (Snyder & Omoto, 2008, p. 22).

This recommendation is an invitation for the executive board of RCWS to engage incoming and current members in a screening process that can take the form of an interview or a questionnaire. It is anticipated that a screening process will enable the organization to discover individual motivations and abilities of the current and prospective members that can be aligned with the organizational needs more accurately to increase volunteer satisfaction and longevity of service. During screening volunteers will be able to familiarize themselves with pertinent job descriptions for various positions, voice their expectations, and choose avenues through which they would be able to exercise their leadership in the context of RCWS (FG). This proactive approach to acknowledging intrinsic motivations and personal attributes will enhance the culture of human value at RCWS and support individuals in reaching their potential through volunteer engagement with RCWS (Stallard & Pankau, 2008).

**Recommendation 2: Enhance communication strategy with current members.**

Survey results demonstrated that RCWS's communication with its members can be improved. As evidenced in Finding 3, some participants indicated that RCWS can be more proactive at seeking feedback from its members, using their ideas to shape the direction of the organization, and attending to their individual needs (S). Kouzes and Posner (2012) echoed the importance of listening in communication, suggesting that leaders who listen "give voice to their constituents' feelings" (p. 117). Listening allows leaders to develop sensitivity to their constituents' desires, values, and dreams (p. 118). Attending to voices of volunteers in the non-profit sector is vital,

since, unlike employees, volunteers gain no compensation from the organization for their contributions and, therefore, may be less invested in addressing an organizational challenge, choosing to leave the organization instead (Garner & Garner, 2011, p. 814).

It is recognized that in the non-profit sector volunteers should be encouraged to express constructive feedback to their organizations (Garner & Garner, 2011, p. 825). Allen and Mueller (2013) have shown that the high rate of volunteer turnover in the non-profit sector is caused by volunteer burnout, which can be prevented by increasing volunteer voice and reducing role ambiguity. First, volunteer administrators should promote the sharing of ideas and feedback from volunteers by hosting regular group meetings to make volunteers "feel more connected to the organization" (p. 150). Second, volunteer administrators need to clearly outline positional roles for volunteers and offer training, so they have a clear understanding of their responsibilities and organizational expectations without expending their personal efforts on navigating the unknown organizational context (p. 150). In the context of RCWS, an orientation for new members and regular town hall meetings can provide the foundation for increased voice and reduce unfamiliarity with Rotary membership, thereby encouraging participation and decreasing chances of departure from the club due to burnout (FG). The volunteer's pride in the organization grows as an outcome of the perceived importance of the organizational mandate, while the volunteer's respect for the organization is garnered by the perceived level of organizational support (Boezeman & Ellemers, 2008, p. 1024). It is imperative that non-profit administrators provide intentional space for reflection exercises, whereby volunteers are given the opportunity to "see the good they are doing" (Wisner et al., 2005, p. 155) and how their contributions are "helping to accomplish the mission of the organization" (p. 155). My recommendation is that the executive board of RCWS should give members the opportunity to reflect on their experience in

order to visualize progress, establish a sense of support from the organization, and voice concerns that may require organizational attention.

**Recommendation 3: Create fellowship opportunities for current and prospective members.** Both, executive board members and current club members suggested that RCWS would benefit from increased opportunities for socialization. Interview participants also spoke highly of the social benefit of experiencing comradery at RCWS. Short (1998) remarkably noted that relationships constitute the "genetic code" of an organization (p. 17). The quality of relationships between individuals in an organization is what defines the current organizational reality and predetermines what that organization can accomplish (Short, 1998, p. 17). Kouzes and Posner (2012) observed that the task of leadership is to help constituents discover their interdependence (p. 230). Durable relationships are cultivated through adoption of the principle of reciprocity, which presumes that people are more likely to help when they have been helped (Baker, 2003; Kouzes & Posner, 2012). Barrett (2010) further posited that connection between constituents in an organization is rooted in mutual empathy, while effective cooperation is inspired by mutual alignment of mission (pp. 210-211). He suggested that having empathy and alignment with a fellow member of an organization allows you to "leverage your talents and energies to increase your collective impact on the world in a manner that brings fulfillment to both parties" (p. 211).

It has been noted that satisfaction with the relationships established in the course of volunteering positively influences one's decision to remain with a non-profit organization (Garner & Garner, 2011; Wisner et al., 2005). Volunteers voiced preferences for organizational environments predicated on "trust and interpersonal relationships" (Stirling et al., 2011, p. 332). The significance of the connection between socialization and volunteer satisfaction plays a

crucial role in volunteer attraction, since, as Hager and Brudney (2004) have shown, prospective volunteers are often recruited to an organization through one-on-one contact with current volunteers (p. 12). Those that come away disappointed with the quality of interpersonal relationships in their volunteer experience with an organization are less likely to enlist other potential volunteers (Stirling et al., 2011, p. 333). Fulfilling social relationships inside the organization and training opportunities are deemed by volunteers as positive support from the organization and, therefore, contribute positively to their inclination to remain (Hidalgo & Moreno, 2009; Newton et al., 2014; Shantz et al., 2014).

It is my recommendation that RCWS establish a planning committee for creation of regular fellowship opportunities outside of humanitarian projects and weekly club meetings that will facilitate social interaction and formation of meaningful relationships. As discussed in Finding 4, only a few survey respondents agreed that they had mentored a new member before. Perhaps therein lies another opportunity to enhance socialization at RCWS by creating mentoring relationships and pairing experienced members with the newly recruited ones to facilitate the necessary training and orientation, while creating a sense of organizational support for incoming volunteers. RCWS will also benefit from measuring its members' satisfaction with the quality of social interaction and organizational support through the use of an annual anonymous survey that will include space for feedback on how organizational socialization processes can be improved.

**Recommendation 4: Establish a social network between club members and beneficiaries.** As discussed in Finding 6, the executive board members expressed interest in hearing feedback from beneficiaries of humanitarian work done by RCWS and witnessing improvement in the quality of beneficiaries' lives (FG). The expressed interest was also echoed by I1 and I2 who highlighted their need to observe the outcome of personal volunteer

involvement with RCWS. Wheatley (2005) spoke of the importance of seeing "the systems we're participating in" (p. 207). She noted that organizations seldom pause long enough to observe the results of their actions in order to engage in reflective processes to glean the learning, limit unexpected outcomes, and correct approaches undertaken to achieve the results (p. 208). Without the understanding of our shared interconnectedness, it is difficult to make sense of appropriate action.

I found the literature supported the idea that volunteers forming connections with beneficiaries allows volunteers to visualize the direct impact of their efforts and strengthens their level of engagement with a non-profit organization (Shantz et al., 2014; Snyder & Omoto, 2008). The opportunity to witness the human need firsthand grows into a stronger commitment to meeting that need and further results in volunteers' satisfaction with the meaning of their efforts (Valeau et al., 2013). Therefore, in order to enhance member retention, I recommend that RCWS facilitate a network between current members and beneficiaries, so that members can generate a more accurate awareness of how their actions impact human lives and fulfill the humanitarian mission of RCWS. Beneficiaries of local projects can be invited to weekly club meetings and social gatherings planned by RCWS, where they would offer testimonials on how RCWS's efforts contributed positively to their well-being. In addition, beneficiaries of local projects can also be asked to organize a tour of their operations for RCWS members, so that members are given the opportunity to have a face-to-face encounter with the recipients of their service. Additionally, beneficiaries of international projects can be requested to submit digital records, such as pictures and videos, to report on how the donated resources were appropriated and to demonstrate to RCWS members the direct impact of their contributions.

**Recommendation 5: Encourage storytelling to celebrate achievements and inspire participation from prospective members.** In the course of the focus group, the executive board members acknowledged that while public recognition is not required by everyone, it is imperative that RCWS recognizes individual contributions made by members towards the humanitarian projects assumed by the club (FG). Kouzes and Posner (2012) stated that leaders who assemble their constituents to recognize organizational successes publicly "reinforce the essence of community" (p. 304). Public recognitions establish a sense of collective identity and remind people that there is a greater vision which their joint efforts are actualizing (p. 308). Sellon (2014) further contended that public appreciation of volunteers for their contributions of personal talents, energies, and time "appears to be an important facilitator of volunteer retention" (p. 430). In addition, non-profit organizations can establish personalized recognitions, those consistent with volunteers' motivations to participate with an organization, as personalized recognitions have the most significant motivational impact on their recipients (Phillips & Phillips, 2011; Wisner et al., 2005). As Shin and Kleiner (2003) concluded, "Showing appreciation satisfies the volunteer's need for self-fulfillment and self-esteem" (p. 70).

Kouzes and Posner (2012) highlighted the importance of using real stories to "inform people about the values and culture of an organization" (p. 323). Several studies concluded that the most effective way to attract prospective volunteers to a non-profit organization is through the use of existing social ties (Hager & Brudney, 2015; Hustinx, Cnaan & Handy, 2010; Lee & Brudney, 2012). In the context of such social ties, storytelling about meaningful volunteer experiences can contest and transform negative perceptions of volunteering, thereby inspiring the listener to engage with a non-profit organization (Ho & O'Donohoe, 2014, p. 871). Therefore, stories about personal experience with volunteering, when shared with prospective candidates for

membership in a non-profit organization, can effectively form a "personalized approach to recruitment" (Haug & Gaskins, 2012, p. 208). Participants in the focus group and interviewees shared many stories about their positive volunteer experiences at RCWS, stressing that they would recommend the club to their existing connections. These stories can be leveraged to remind current members of why they belong to RCWS and attract interested individuals to explore the positive nature and impact of RCWS for themselves.

I recommend that RCWS adopt the practice of public recognitions, personalizing them to align with individual members' motivations to participate. Awareness of those motivations can be gleaned through some form of preliminary screening, whether a face-to-face conversation or a survey. In addition, prospective members can be invited to weekly meetings and monthly assemblies, where current members share their testimonials of positive experience with RCWS to celebrate the club's impact and to generate interest in the club among the visitors.

### **Organizational Implications**

In order to commence this action research inquiry, the executive board of RCWS and the Project Sponsor, Teresa Sutherland, were engaged in the formulation of the inquiry topic. In action research, commitment to the inquiry is inspired through inclusion of all organizational voices affected by the subject of the inquiry (Stringer, 2014). Therefore, in order to encourage organizational commitment to the inquiry findings, I involved the Project Sponsor and members of the executive in personal discussions of the findings, conclusions, and ensuing recommendations. Initially, I shared the study findings and potential practical steps relevant to the inquiry with the Project Sponsor, Teresa Sutherland, and an executive board member, Don Rugg, who succeeded Teresa as the president of RCWS. After I drafted the recommendations, I was able to discuss them with both, Teresa Sutherland and Don Rugg, seeking their feedback and

subsequent approval of each. It is imperative to note that the focus group with RCWS's executive board members became the "Make-It-Happen" component of this inquiry. While it was used as a method to garner additional qualitative data, the executive board members were introduced to the outcome of the survey and common themes raised by the four interviewees. Given the dialogical nature of the group method, certain observations voiced by participants in the course of the focus group were discussed by the group as potential practical steps to implement in order to enhance member retention at RCWS. I recorded those observations as data points and, where appropriate, used them to augment the final recommendations.

Upon the conclusion of this inquiry, the project sponsor and stakeholders are exploring the possibility of engaging in a world cafe session to gain familiarity with the inquiry findings and recommendations. It is anticipated that the world cafe session would emerge as the Design phase of the appreciative process, equipping the participants to further formulate concrete action steps based on the learning that occurred in the course of the inquiry (Bushe, 2013).

Implementation of concrete steps discovered during the world cafe would unfold during the Delivery/Destiny phase (Bushe, 2013), which is external to the scope of this study. My post-project role would be to facilitate the world cafe session in order to support the system in the discovery of practical steps to implement the learning.

Organizational change is often perceived as a linear process, but the dynamic of change implementation is anything but linear (Bolman & Deal, 2013; Burke, 2008). While recommendations in this chapter are offered in a sequential pattern, the order of implementation of the recommendations can be interrupted by circumstances and availability of organizational resources. In order to ensure that implementation of the recommendations is successful, the executive board of RCWS will need to maintain strong personal relationships with current

members, engage in diplomatic and authentic communication, minimize resistance through abstinence from forcing change on constituents (Weisbord, 2012), and embody the vision of change throughout the process (Burke, 2008). In my effort to provide an outline of the leadership implications for organizational change required by the proposed recommendations, I used Burke's (2008) pre-launch, launch, and post-launch phases of change implementation.

In the pre-launch phase of the change initiative, it becomes important to establish a sense of urgency (Kotter, 2012). In order to raise a sense of urgency, the executive board of RCWS can work to minimize the impact of the "sources of complacency" (Kotter, 2012. p. 44) and illustrate the crises of losing members along with the effect it would have on the quality and quantity of the club's humanitarian efforts (Kotter, 2012, p. 47). Recommendation 2 can be introduced in this phase, as it is primarily concerned with enhancing communication with the current members. Communication is especially vital in the pre-launch phase, since it is foundational for "participative and coaching behaviour" (Burke, 2008, p. 740) characteristic of change management. Successful leaders are "concerned with the needs and development of their subordinates" (Burke, 2008, p. 740). Giving voice to current members would allow for a more accurate depiction of their understanding of their function in the organization and their expectations for the organization. At this stage, there may also be an opportunity for implementation of Recommendation 1, as it has to do with screening incoming and current members to determine their motivations and abilities. An improved awareness of the motivations and abilities of the existing human capital can provide an insight into proper utilization of the human assets to support the organizational change. Therefore, communication is essential to present a convincing need for enhancement of member retention at RCWS, articulate a clear vision of the steps required to address the need, and facilitate a dialogue about the anticipated

change process. As Armenakis, Harris, and Mossholder (2009) poignantly observed, “The form of persuasive communication employed also sends symbolic information regarding the commitment to, prioritization of, and urgency for the change effort” (p. 574).

During the launch phase of the change initiative, it is imperative to maintain the same communication dynamic. Burke (2008) observed that while it is not the core responsibility of the leader to do all communication regarding the change initiative, the leader must ensure that communication is continuous (p. 748). An important issue that can arise in this stage is individual resistance to organizational change due to potential disruptions in the status quo. Choi and Ruona (2011) advised that "the unfreezing step" in the organizational change process lies in transforming the attitudes of organizational members in such a way that they begin to understand change as "necessary and likely to be successful" (p. 53). The executive board of RCWS will need to seek involvement from RCWS members rather than simply impose change on them (Burke, 2008, p. 749). A helpful technique in change communication in the non-profit sector is "equal participation", since it presumes the importance of a dialogical engagement, whereby information relevant to organizational change is distributed and feedback from stakeholders is sought (Lewis, Hamel, & Richardson, 2001, p. 19). Organizational change, therefore, is properly understood as a collaborative process (Lewis et al., 2001). The responsibility of RCWS leadership becomes structuring tasks that people can do for themselves (Weisbord, 2012). As Walinga (2008) advised, helping RCWS members to define individual areas of power within the change initiative would prepare them "to let go of their desire for control over the change or barriers posed by the change and enable them to focus instead on resolving the interference such barriers and changes create to the attainment of their goals" (p. 340). Recommendations 3 and 4 can be implemented in this stage due to their focus on creation of fellowship opportunities for

current and prospective members and facilitation of a social network between current club members and beneficiaries respectively. The relational nature of both recommendations fosters collaboration between all parts of the system (see Figure 1), which is instrumental for organizational change.

In the post-launch phase of the change initiative, the challenge will lie in sustaining the process of change (Burke, 2008). As Kotter (2012) noted, the level of collaborative effort in the change initiative can be maintained through generation of short-term wins. Celebration of short-term wins will allow the system to see the value of individual sacrifices, the impact of the joint effort, and provide temporary recovery from persistent effort to avoid burnout (Kotter, 2012, pp. 126-128). Implementation of Recommendation 5 is especially fitting in this stage, given its focus on storytelling, recognition, and celebration. RCWS will benefit from creating social gatherings during which the progress towards enhanced member retention can be tracked, individual efforts recognized and success stories shared. Such venues can both encourage the heart of those engaged in the change process and attract prospective candidates to joining RCWS.

In the event that the articulated recommendations are not implemented, a number of negative effects can be foreseen. Failure to understand what attracts prospective members and makes them want to stay can result in a membership decline due to burnout, as current members will have to carry out a set of responsibilities over an indefinite amount of time without possible relief. Members may also be reluctant to step into roles and responsibilities, if there are no apparent candidates to replace them. In addition, with the absence of improved communication, members can grow discouraged with lack of opportunities to voice feedback or utilize their strengths in roles that best fit their personal profile. Therefore, RCWS's struggle to retain a

diverse membership contingent would limit its creativity and make it less efficient in offering service to beneficiaries.

At last, the contribution of this thesis to the field of scholarship is rooted in Finding 5. In the course of interviewing external stakeholders, such as community partners and past members who still remain active volunteers with RCWS, it became apparent that certain individuals desire the opportunity to actualize personal humanitarian motivations through the structure of a given non-profit organization. While literature discussed volunteer motivations and their impact on volunteer retention, no study accounted for the idea that certain individuals look at non-profit organizations as vehicles to champion their individual social causes, despite the fact that the organizational focus may be completely different to begin with. This creates both a problem and an opportunity. The problem is that such volunteers can elect to part with a given non-profit entity once they no longer feel that they are able to fulfill their social cause through the organizational structure. Alternatively, if their pursuit of a specific social cause aligns with the organizational mandate, they can use their passion to become powerful champions of the organizational mandate, propelling the organization to new heights.

### **Implications for Future Inquiry**

In exploring the subject of member retention at RCWS, it was discovered that some individuals left the club due to conflicts in their work schedule with the time and day when RCWS held its meetings (I1, I2, I3, I4). It would be interesting to see whether other Rotary clubs have faced a similar issue with member retention in the past, and how they approached the matter of accommodating their members' schedules to help them stay. Additionally, several scholars noted that volunteer administration practice in the non-profit sector has to adapt to generational differences (Caldwell et al., 2008; Hager & Brudney, 2015). It would, therefore, be

helpful to learn how generational differences impact member attraction and retention in Rotary, and whether the findings obtained in the context of Rotary would echo the results of studies conducted in other non-profit entities.

In addition, before the results of the present study could find theoretical application for other Rotary clubs, future research in the context of Rotary should replicate the results in diverse cultural environments. Volunteer motivation is tied to a sense of identity, which, in turn, is a cultural construct (Ho & O'Donohoe, 2014). Non-profit organizations should be aware of the existing cultural perceptions of volunteering and adapt management strategies accordingly in order to secure volunteer participation (Randle & Dolnicar, 2012). It is, therefore, plausible to contend that motivational factors differ across the globe. Studies on volunteer motivation and appropriate management approaches for a North American context may not coincide with discoveries of motivational factors for volunteers in other parts of the world. With Rotary being an international network of clubs, it would be sensible to conduct an inquiry into volunteer retention across several cultural environments to provide the organization with the tools to address the issue of member retention in various parts of the world.

Ultimately, leadership is not a "one-size-fits-all" endeavour, especially in the realm of volunteer administration, where support is inspired rather than commanded. Effective volunteer leaders know their followers. The pursuit of that knowledge is what separates successful non-profit entities from unsuccessful ones.

### **Thesis Summary**

This chapter introduced pertinent recommendations and organizational implications to support RCWS in enhancing member retention. With the inquiry questions and sub-questions in mind, the proposed recommendations included performance of a screening process to learn

individual motivations, expectations, and attributes of volunteer members, enhancement of communication within the club, creation of fellowship opportunities for current and prospective members to encourage deeper interpersonal connections, establishment of a social network between club members and beneficiaries, and celebration of individual and collective achievements through storytelling. In the section on organizational implications, an implementation process was suggested that encompasses the three phases of organizational change, within which each of the recommendations was properly contextualized. Persuasive communication and empowerment of the individual components of the system for action towards enhancement of member retention was understood to be critical to sustenance of the change process at RCWS.

RCWS possesses a strong reputation in the community. Both internal and external stakeholders confidently stated that their experience with the club has been positive. Stories of influence that the RCWS experience has had on the lives of its affiliates provide for a powerful legacy and a firm foundation on which an even brighter future could be built. As this action research inquiry has shown, the key to a bright organizational future in the non-profit sector is contingent on how well administration knows its human capital and how well it attends to its needs and motivations. Administration that adopts a relational management stance is more likely to establish meaningful connections with its constituents and place them in positions where their passion and individual prowess would serve as the impetus for unceasing organizational progress. However, one must not neglect the influence that seeing the outcome of a social action can have on its achiever. There is something life-giving in the encounter between the helper and the helped. Organizational life in the non-profit realm is sustained with a clear vision of humanitarian impact.

As I conclude this action research inquiry, it is my sincere hope that the recommendations presented in this paper will assist RCWS with enhancement of its member retention strategies. The executive board and I will plan a world cafe session to disseminate the results of this study and engage the system in designing practical steps to support member retention practices at the club.

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**Appendix A: Invitation to Participate – On-line Survey**

Dear [Prospective Participant],

I would like to invite you to be part of a research project that I am conducting. This project is part of the requirement for my Master's Degree in Leadership, at Royal Roads University. The objective of my research project at *the Rotary Club of West Shore* is to determine "*How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention?*"

Every Rotarian will be invited to take part in the survey. It is anticipated that enhanced member retention practices will allow us to diversify our club and engage with the local and international communities more effectively.

This phase of my research project will consist of an on-line anonymous survey and is estimated to last approximately 15 minutes.

The attached document contains further information about the study conduct and will enable you to make a fully informed decision on whether or not you wish to participate. Please review this information before going to the URL above to complete the online anonymous survey.

If you do choose to participate, please understand that once you complete the on-line anonymous survey it will be impossible to remove the data you provided as it will have been compiled anonymously with other responses becoming part of a larger data collection.

I realize that due to our collegial relationship, you may feel compelled to participate in this research project. Please be aware that you are not required to participate and, should you choose to participate, your participation would be entirely voluntary. If you do choose to participate, you are free to withdraw without prejudice by not taking the online anonymous survey, hence if you do not wish to participate, simply do not reply to this request. Your decision to not participate will also be maintained in confidence. Your choice will not affect our relationship or your membership status in any way.

Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes.

If you would like to participate in my research project, please go to [URL]

Sincerely,

George Kogan

**Appendix B: Invitation to Participate – Focus Group**

Dear [Prospective Participant],

I would like to invite you to be part of a research project that I am conducting. This project is part of the requirement for my Master's Degree in Leadership, at Royal Roads University. The objective of my research project at *the Rotary Club of West Shore* is to determine "*How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention?*"

You have been asked to be part of a FG, a facilitated dialogue and discussion group where you will have an opportunity to offer up your opinion on questions posed to the group on member retention at RCWS. These questions will have been developed out of the on-line anonymous survey that you may have been a part of.

The attached document contains further information about the study conduct and will enable you to make a fully informed decision on whether or not you wish to participate. Please review this information before deciding whether you wish to participate in the FG or not.

Your participation in this particular FG is based on your membership status. If you do choose to participate, please understand that once the FG has commenced, others in the group will know you have participated, in the same way that you will know others who have participated. The privacy of the dialogue you participate in is between the participants and the facilitator. The dialogue of the FG will be validated by the group prior to completion, compiled and anonymized so it will be impossible for anyone outside the FG participants to know who made any particular comment in the group. You may withdraw from the group at any time, but any comments you may have made in the group will remain as part of the anonymous data from the inquiry.

I realize that due to our collegial relationship, you may feel compelled to participate in this research project. Please be aware that you are not required to participate and, should you choose to participate, your participation would be entirely voluntary. If you do choose to participate, you are free to withdraw without prejudice at any time. Your decision to not participate will also be maintained in confidence. Your choice will not affect our relationship or your membership status in any way.

Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes.

Sincerely,

George Kogan

**Appendix C: Invitation to Participate – Telephone Interview**

Dear [Prospective Participant],

I would like to invite you to be part of a research project that I am conducting. This project is part of the requirement for my Master's Degree in Leadership at Royal Roads University.

The objective of my research project at the Rotary Club of West Shore is to determine *“How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention?”*

Your name was chosen as a prospective participant because you have either volunteered with the RCWS or partnered with the RCWS in its fundraising initiatives, gaining some familiarity with the club's identity and purpose.

This phase of my research project will consist of a telephone interview and is estimated to last about 15 minutes. I would contact you at the time of day that is most convenient to you.

Please, be advised that the interview will be recorded for data collection purposes. I will also share a transcript of the interview with you.

The attached document contains further information about the study conduct and will enable you to make a fully informed decision on whether or not you wish to participate. Please review this information before responding.

You are not required to participate in this research project. If you do choose to participate, you are free to withdraw at any time without prejudice.

Please feel free to contact me at any time should you have additional questions regarding the project and its outcomes.

If you would like to participate in my research project, please contact me at:

Name: George Kogan

Email: [REDACTED]

Sincerely,

George Kogan

**Appendix D: Research Consent Form: Telephone Interview**

By signing this form, you agree that you are over the age of 19 and have read the information letter for this study. Your signature states that you are giving your voluntary and informed consent to participate in this project.

I consent to the audio recording of the telephone interview

Name: (Please Print): \_\_\_\_\_

Signed: \_\_\_\_\_

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

**Appendix E: Research Consent Form: Focus Group**

By signing this form, you agree that you are over the age of 19 and have read the information letter for this study. Your signature states that you are giving your voluntary and informed consent to participate in this project.

I consent to the written recording of the Focus Group

I commit to respect the confidential nature of the Focus Group by not sharing identifying information about the other participants

Name: (Please Print): \_\_\_\_\_

Signed: \_\_\_\_\_

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

### **Appendix F: Research Consent: Survey Preamble**

My name is George Kogan, and this research project at *the Rotary Club of West Shore* to determine “*How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention?*” is part of the requirement for Master of Arts in Leadership at Royal Roads University. The research includes this survey and is estimated to take 15 minutes to complete.

The information you provide will be summarized, in anonymous format, in the body of the final report, so the instance of being able to extract personal derived data is not possible. As such, there will be no way to remove the data that you personally input. At no time will any specific comments be attributed to any individual. All data received will be kept confidential.

As this survey is anonymous, by continuing from this point forward, you acknowledge that the data collected will be used as part of the ongoing research and that by continuing, you are giving your voluntary and informed consent to participate in this project.

Your completion of this survey will constitute your informed consent.

- I confirm that I have read the Information Letter that provides detail of the research, and give my informed consent to participate in this survey (please tick)

**Appendix G: Questions for Phone Interviews**

1. Would you share a story about a time you experienced in your involvement with RCWS that was a highly positive and memorable event? What was that, and who was there?  
Why were you and RCWS doing something together?
2. What has been your working experience with RCWS?
3. Are you interested in specific projects/volunteer assignments within RCWS?
4. Would you recommend the RCWS to your connections?

**Appendix H: Questions for the Focus Group**

1. Could you tell your story about the most memorable, high-point time you have experienced with RCWS, a time you were proud to be involved with RCWS? What happened? Who was there? Do our members find meaning in the work they perform?
2. What meaning does the work of RCWS have for you? What do you see in the way members see this?
3. Do you feel appreciated for your effort, time, and skills in RCWS? How might we do things differently to help members feel more appreciated?
4. How are we engaging members who leave RCWS?
5. What do our long service members find so engaging about RCWS? How could we generate that kind of feeling for new members?
6. If you were to come to RCWS in a year's time, what would the RCWS that you would be most excited to be part of, look like? What might be different?

### Appendix I: On-line Survey Questions

1. Why did you join the Rotary Club of West Shore (Please, check all that apply)?

Personal growth (N=4)

Professional development (N=1)

Prestige (N=1)

Networking (N=5)

Opportunities for fellowship with other members (N=12)

Opportunities for making a difference locally (N=12)

Opportunities for making a difference internationally (N=8)

Other (N=1)

2. How content are you with your membership?

Responses: satisfied (N=8), somewhat satisfied (N=6), neutral (N=1), somewhat dissatisfied (N=0), dissatisfied (N=0)

3. Consider the club's level of success in involving its members and on a scale of 1 to 5 (one being the highest and five being the lowest) evaluate the following statements:

- 3a. My club communicates well with its members

Responses: 1 (N=2), 2 (N=7), 3 (N=4), 4 (N=2), 5 (N=0)

- 3b. My club proactively seeks the input of its members

Responses: 1 (N=3), 2 (N=4), 3 (N=4), 4 (N=4), 5 (N=0)

- 3c. My club hears the members' ideas and implements them

Responses: 1 (N=1), 2 (N=7), 3 (N=4), 4 (N=3), 5 (N=0)

- 3d. My club is attentive to the needs of its members

Responses: 1 (N=0), 2 (N=9), 3 (N=3), 4 (N=3), 5 (N=0)

4. Consider the following statements about your membership with the Rotary Club of West Shore and indicate your agreement with each:

- 4a. I feel welcome in my club

Responses: agree (N=12), somewhat agree (N=3), neutral (N=0), somewhat disagree (N=0), disagree (N=0)

- 4b. I establish valuable relationships through my club

Responses: agree (N=10), somewhat agree (N=4), neutral (N=1), somewhat disagree (N=0), disagree (N=0)

- 4c. My club takes advantage of my talents and skills

Responses: agree (N=8), somewhat agree (N=5), neutral (N=1), somewhat disagree (N=1), disagree (N=0)

- 4d. My experience with the club is worth the time I commit to it

Responses: agree (N=13), somewhat agree (N=2), neutral (N=0), somewhat disagree (N=0), disagree (N=0)

- 4e. Through my club I make a difference in my community

Responses: agree (N=9), somewhat agree (N=3), neutral (N=3), somewhat disagree (N=0), disagree (N=0)

- 4f. Through my club I make a difference in the world

Responses: agree (N=8), somewhat agree (N=5), neutral (N=2), somewhat disagree (N=0), disagree (N=0)

- 4g. I am proud to be a member of my club and I would recommend it to my connections

Responses: agree (N=13), somewhat agree (N=2), neutral (N=0), somewhat disagree (N=0), disagree (N=0)

5. Consider the culture of our club and indicate your level of agreement with the following statements:

- Club meetings are a good use of my time

Responses: agree (N=5), somewhat agree (N=10), neutral (N=0), somewhat disagree (N=0), disagree (N=0)

- I have mentored a new member

Responses: agree (N=3), somewhat agree (N=2), neutral (N=4), somewhat disagree (N=1), disagree (N=5)

- The members in my club care about one another

Responses: agree (N=9), somewhat agree (N=6), neutral (N=0), somewhat disagree (N=0), disagree (N=0)

- My club reflects the demographics of my community

Responses: agree (N=1), somewhat agree (N=7), neutral (N=1), somewhat disagree (N=3), disagree (N=3)

- My club proactively identifies the strengths of its members and applies those strengths effectively in various service projects

Responses: agree (N=1), somewhat agree (N=8), neutral (N=5), somewhat disagree (N=1), disagree (N=0)

6. Consider the club's involvement in humanitarian service and offer your level of agreement with the following statements:

- Service projects are well planned and take full advantage of my skills and availability

Responses: agree (N=4), somewhat agree (N=9), neutral (N=2), somewhat disagree (N=0), disagree (N=0)

- Service projects undertaken by my club have meaning for me

Responses: agree (N=9), somewhat agree (N=6), neutral (N=0), somewhat disagree (N=0), disagree (N=0)

- Service projects effectively meet the human need

Responses: agree (N=10), somewhat agree (N=4), neutral (N=1), somewhat disagree (N=0), disagree (N=0)

7. What aspects of the mission and values of RCWS are most important to you?

Responses: textbox

8. Do you feel that your personal values align with the values of the Rotary Club of West Shore?

Responses: textbox

## **Appendix J: Research Information Letter**

### **Enhancing Member Retention at the Rotary Club of West Shore (RCWS)**

My name is George Kogan, and this research project is part of the requirement for a Master of Arts in Leadership degree at Royal Roads University. My credentials with Royal Roads University can be established by contacting Dr. Brigitte Harris, Director, School of Leadership Studies: [REDACTED]

#### **Purpose of the study and sponsoring organization**

The objective of my research project at *the Rotary Club of West Shore* is to determine "How might engaging the stakeholders of the Rotary Club of West Shore (RCWS) enhance member retention?"

#### **Your participation and how information will be collected**

The research will consist of an online anonymous survey, which contains 8 questions that will take approximately 10 minutes to complete. For the full benefit of this study, it is hoped that every member would set aside the time to participate in an online survey that will be distributed by the club secretary.

A telephone interview will be conducted with 4-6 external stakeholders (community partners, past members, active volunteers with the club) who have been actively involved with the Rotary Club of West Shore in its service projects and fundraising initiatives. The phone interviews will take approximately 10-15 minutes. The anticipated questions for the phone interviews are:

1. Would you share a story about a time you experienced in your involvement with RCWS that was a highly positive and memorable event? What was that, and who was there? Why were you and RCWS doing something together?
2. What has been your working experience with RCWS?
3. Are you interested in specific projects/volunteer assignments within RCWS?
4. Would you recommend the RCWS to your connections?

A focus group with the executive board of the RCWS will take place once the data collected from telephone interviews and online surveys has been analyzed. The analysis will shape the questions that will be presented to the executive board during the focus group. For the purpose of the proposal, the sample questions are:

1. Could you tell your story about the most memorable, high-point time you have experienced with RCWS, a time you were proud to be involved with RCWS? What happened? Who was there? Do our members find meaning in the work they perform?
2. What meaning does the work of RCWS have for you? What do you see in the way members see this?

3. Do you feel appreciated for your effort, time, and skills in RCWS? How might we do things differently to help members feel more appreciated?
4. How are we engaging members who leave RCWS?
5. What do our long service members find so engaging about RCWS? How could we generate that kind of feeling for new members?
6. If you were to come to RCWS in a year's time, what would the RCWS that you would be most excited to be part of, look like? What might be different?

### **Benefits and risks to participation**

Enhanced membership retention at RCWS would allow the club to take full advantage of its diversity in order to increase the volume and quality of its participation in humanitarian service, thereby maximizing brand awareness among potential sponsors, community partners, and prospective members looking to join a volunteer organization.

There are minimal risks in participating, as all the data collected will be anonymized before it becomes part of the final report.

### **Confidentiality, security of data, and retention period**

I will work to protect your privacy throughout this study. All information I collect will be maintained in confidence with hard copies (e.g., consent forms) stored in a locked filing cabinet in my home office. Electronic data (such as transcripts or audio files) will be stored on a password-protected computer on my home computer. Information will be recorded in handwritten format or audio recorded, and, where appropriate, summarized, in anonymous format, in the body of the final report. At no time will any specific comments be attributed to any individual unless specific agreement has been obtained beforehand. All documentation will be kept strictly confidential. Upon completion of the project all data will be destroyed.

Please, be aware that due to the nature of the focus group method, it is not possible to keep identities of the participants anonymous from the researcher, facilitator, or other participants. However, each participant will be asked and reminded to respect the confidential nature of the research by not sharing names or identifying comments outside of the group. You may withdraw from the group at any time, but any comments you may have made in the group will remain as part of the anonymous data from the inquiry.

Also, in the event that your online survey response is processed and stored in the United States, you are advised that its governments, courts, or law enforcement and regulatory agencies may be able to obtain disclosure of the data through the laws of the United States.

### **Sharing results**

In addition to submitting my final report to Royal Roads University in partial fulfillment for a Master of Arts in Leadership degree I will also be sharing my research findings with the Rotary

Club of West Shore (RCWS). Depending on the outcome of the project, the findings could also be shared with other Rotary clubs or the Rotary International.

There is also a possibility that the report may be the basis for an article in a professional or scholarly journal or a conference presentation.

### **Procedure for withdrawing from the study**

You are not required to participate in this research project. By going to the web-site where the survey is located and by completing the anonymous survey, you have given implied consent to participate. Once you have completed the survey, your data becomes part of a larger anonymous data set. It will be impossible to remove your input from this data.

If you were asked to attend the Focus Group, you have the option of withdrawing at any time prior to the start of the group by sending an email to me or letting me know in person. Participants withdrawing from interviews have the right to withdraw their data within a week after the interview, after which time the interview joins the anonymous data set of the inquiry. Focus group participants may withdraw at any time, but the comments they may have made while in the group remain as anonymous data. In either case above, your non-participation will not be held against you in any fashion, as the only person who will know that you withdrew is held by ethical research responsibility for not disclosing it to anyone.

At the location and on the date selected for the focus group, each participant will be asked to sign a letter of consent which informs the researcher that a person is there on their own conviction. As the focus group is a group format, it may not be possible for individual's comments to be identified and removed if a participant wishes to withdraw.

By replying directly to the e-mail request for participation, or by signing the in-person consent form, you indicate that you have read and understand the information above and give your free and informed consent to participate in this project.

Please keep a copy of this information letter for your records.