

A Happy Volunteer: Workgroup Volunteer Board Development

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Executive Summary

The purpose of this paper is to look specifically at workgroup boards to identify their motivations and challenges, and to develop recommendations on how to address those challenges. Workgroup boards are volunteer boards that have to both govern and manage because they do not have paid executive staff. This paper looks particularly at volunteer community development organizations in Eastern Prince Edward Island who play an important role in their rural communities by providing required infrastructure and services.

It was determined through observation, focus groups, and interviews that the challenges these volunteers face include poor time management and lack of clarity of roles and responsibilities. These challenges can cause an organization to be inefficient which, in turn, can contribute to the workgroup boards' greatest challenge of recruiting and retaining quality volunteers. It is assumed that more effective boards will give rise to a better volunteer experience which will facilitate the recruitment and retention of quality volunteers.

There is no one list of practices that every board can implement to improve board effectiveness. Each board must determine what efforts or practices are best for them. However, this report makes recommendations that provide workgroup boards with a place to start. The recommendations include motivating core volunteers to initiate change, participating in training opportunities, having scheduled strategy sessions to discuss the organization's role and board development plans, and to acknowledge volunteers' efforts. It was also identified that volunteer workgroup boards will need additional support to be successful in these efforts whether through government or some other source. The most important thing for volunteer workgroup boards to understand about improving their effectiveness and volunteer experiences is that it is a continuous process and will require ongoing efforts.

Introduction

Virtually all non-profit and voluntary organizations in Prince Edward Island are governed by a volunteer board of directors. The majority of research published to date has focused on volunteer boards with hired executive directors and places great importance on the role the staff plays in board development and the overall experience of the volunteers. However, many non-profit organizations, especially in rural and smaller communities, are run purely by a volunteer board that not only governs but also does the work, as they have little to no staff. Carver (1997) refers to this type of board as a “workgroup board” (p.3). The purpose of this paper is to look specifically at this type of workgroup board and identify their motivations and challenges, and to develop recommendations on how to address those challenges.

My interest in this topic originated from my current employment at Active Communities Inc., a non-profit Regional Economic Development Organization (REDO) made up of an independent, volunteer board of directors. Our directors and staff work with all levels of government, businesses and individuals, development groups, and communities to meet the needs of small businesses and communities throughout Eastern Prince Edward Island. As the Economic Development Officer, I work with many volunteer workgroup boards to identify needs and opportunities within Eastern Prince Edward Island and to develop strategies for community enhancement. I help them to obtain funding, and manage projects and budgets. After six years in this position I see the invaluable role these volunteers play in the economic and social sustainability of our communities.

Volunteers are helping to build strong communities across Canada. This holds true in Prince Edward Island. A recent study completed by the Community Foundation of PEI (2010) compiled information regarding the impact of the volunteer/non-profit sector. The Prince

Edward Island volunteer/non-profit sector includes a wide range of organizations established to meet the needs of individuals and communities. In Prince Edward Island there were 943 non-profit organizations that employed 6,172 people and produced \$230 million in revenue in 2003. In 2003, there were 53,621 people who volunteered in PEI representing approximately 39% of the Island's population.

Volunteer/non-profit organizations provide social and economic benefits to urban and rural residents alike. In rural areas, voluntary and non-profit organizations deliver a lot of services that keep people in their communities, such as providing sports clubs, senior programs, and local fairs and exhibitions. This point should be of great interest and importance as rural Prince Edward Island is facing a declining population. PEI's rural population fell almost 5% between 1986 (78,355) and 2006 (74,678; Statistics Canada, 2009). The presence of these organizations not only provides much needed services, but also creates a sense of community that may help mitigate this trend.

The community organizations which are the focus of this paper are all non-profit organizations with a mandate of community development and enrichment. They are run by volunteer boards that have no executive directors or general managers to assist them in the overall management of the organization. They often do provide employment in the community through seasonal jobs or contract positions; however, these positions require direct supervision by the volunteers rather than having a staff leader providing supervision to employees.

These groups have identified a need within their community and have developed a plan to address it in an effort to make their community a place people want to call home. To understand the true impact these organizations have on their communities in rural Prince Edward Island, here are just a few examples of the roles they play:

Fairs & Exhibitions: A volunteer board organizes the largest agricultural fair in Eastern Prince Edward Island. This exhibition draws over 8,000 people annually and maintains seven seasonal staff. The volunteer board recently obtained over \$700,000 worth of funding for upgrades to the event site. The event site is also used for community events, weddings and has attracted national conferences.

Community Centres: All community centres in rural Eastern Prince Edward Island are managed by volunteer boards. These boards are responsible for scheduling events, bookkeeping, and event planning. These centres are places where people gather for events such as weddings, birthdays, benefit concerts, and card games. They anchor a community and create a sense of pride.

Tourism: There are currently four lighthouses that are owned and operated by volunteer boards in Eastern PEI. All of these lighthouses are open as tourism attractions. The volunteer board often will work on site, and manage staff and budgets. These lighthouses and their boards bring thousands of visitors every year who contribute to the local economy.

The examples above demonstrate how volunteer workgroup boards take on great responsibilities, and with these responsibilities come great challenges. To better understand these challenges, two focus groups were held with volunteer members of workgroup boards that focus on community development in Eastern Prince Edward Island. This sample was identified by the author as an area of interest and importance for in-depth research, as I currently work with these types of organizations and witness daily their contributions and challenges. The purpose of the focus groups was to identify the motivations of these volunteers, the challenges they face, and what can be done to address these challenges. This report also presents the results of three

interviews with professional consultants who specialize in non-profit organizations, board development, and adult education. The objective of these interviews was to obtain additional perspectives on the demands placed on these volunteer workgroup boards and to further examine possible solutions.

My end objective for this research report is to provide information to the organizations I that I support through my work with Active Communities that will assist them to recruit and retain quality volunteers. In other words, I hope to help these organizations to develop the skills needed to create a positive volunteer experience. It is my belief, and it was also stated by Reilly, that “the more people that have a positive experience as a volunteer, the more likely that they will continue to volunteer and the more likely that they will encourage people they know to become volunteers,” (cited in McCurley & Lynch, 2005, p. 5). The assumption is that more effective boards will enhance volunteers’ experiences which will make it easier to recruit and retain quality volunteers.

This report will first analyze pertinent research through a literature review. Then, I describe my research methods before discussing findings from personal observations, focus groups, and interviews. The paper concludes with recommendations on how to make volunteer workgroup boards more effective.

Literature Review

“Volunteering builds and strengthens relationships within local communities, contributes to population health and provides a sense of fulfillment and wellbeing to active citizens” (Maranta, 2010, p. 2). The roles and responsibilities of volunteers have grown greatly over the past decade, as have their challenges. This has caused great interest in understanding volunteers, non-profit organizations, and their boards. However, a gap has been identified in the literature.

Many of the authors who refer to non-profit organizations focus on non-profit organizations with paid executives rather than a purely volunteer non-profit organization. There are very few references to the latter type of organizations/boards which, as discussed previously, play a significant role in our communities, particularly rural ones. As previously stated, Carver (1997) referred to these boards in his book; *Boards that Make a Difference*, as workgroup boards that are governing boards with little or no staff. They must govern and be the workforce as well. A national study of board governance practices in the non-profit and voluntary sector in Canada commissioned by the Centre for Voluntary Sector Research and Development referred to this type of board as “grassroots” (Bugg, 2006). Apart from these sources, there has been little focus on workgroup boards, their challenges, and how to improve them.

To have an extensive understanding of volunteer boards, numerous topics have been researched such as motivation, challenges, governance, effectiveness, and human resource management practices. Although the majority of the research has focused on volunteer boards with paid executive directors, or general managers, it is worthwhile to see what can be learned from this existing research, and how it can be transferred to workgroup boards.

Motivation to Volunteer

Understanding why people volunteer is important, when establishing a reasonable expectation for the level and type of volunteer participation, and to create mutually satisfying volunteer situations (Davis, 2000). Non-profit agencies must adopt progressive human resource practices to function effectively. A key component in developing such effective practices in the area of recruitment, retention, and development is understanding what motivates volunteer participants (Inglis & Cleave, 2006).

Butler, DePhelps, and Gray (1995) reviewed previous studies on the topic of motivation and gathered information from people's situations, experiences, problems, and perspectives to develop a clear summary of what motivates volunteers.

Altruism: is a belief in a specific cause and something done for the good of others.

Self-interest: perceived benefits might include social visibility, and professional recognition.

Obligation: someone who benefited from the work of an organization in the past may feel obligated to respond to a call for volunteers.

Social Outlet: the desire to meet people with similar interests or to fill free time with a worthwhile activity.

Although people's motivations vary from volunteer to volunteer, they all face challenges. Now that we know why people volunteer it is equally important to know what challenges they face in order to address these challenges.

Challenges of Volunteer Boards

In 2005, Strategic Leverage Partners Inc. (SLP) partnered with the Centre for Voluntary Sector Research and Development (CVSRD) to produce a report containing unique data about Canadian non-profit board governance practices that could be shared by the non-profit and voluntary organizations throughout the country. The report developed by the SLP and CVSRD is one of the largest studies conducted that specifically addresses the non-profit sector in Canada. Through several methods of research, including a web-based survey, key informant interviews, focus groups, and community roundtables, the *National Study of Board Governance Practices in the Non-profit and Voluntary Sector in Canada* report identified common themes of issues and

challenges facing the non-profit sector no matter how they differ in size, mission, or how they serve the community. These themes include (Bugg, 2006, p. 86):

- Leadership: The importance of the chair's leadership and the importance of selecting and retaining the right CEO.
- Recruitment: The challenge of recruiting and retaining qualified board members and the difficulty of dealing with board members appointments.
- Succession Planning: Developing board leaders and planning for the succession of the CEO or board chair.
- Role Clarity: The need for role clarity and ensuring that board members understand their fiduciary duties and responsibilities.
- Education and Development: The importance of continuous education and development of board members.
- Accountability and Stewardship: The way in which higher expectations and increasing demands from donors and funders affect the board's role.
- Culture: The importance of developing the right culture and balancing the need for a successful board culture with the restriction of policies and processes.
- Board Meetings: The importance of effective board meetings to carry out the work of the board and engage board members.
- Strategic Planning: The need to understand fully the board's role in strategic planning and to increase board member competency in this area.
- Performance Measurement: The need for performance measures to assess board effectiveness.
- Risk Management: The need for better risk management policies, processes, and tools.

Another study that specifically addresses non-profit organizations in Prince Edward Island, *Building the Capacity of PEI's Third Sector*, commissioned by the Community Foundation of PEI (2010), identified the most significant challenges facing the non-profit sector in PEI which include access to funds, recruitment, creating awareness, and access to training. Accessing funding for special projects or operations support can be difficult, especially with government spending cuts. Applying for funding can be time consuming and labour intensive. Consequently, a great deal of the volunteers' time and efforts can be spent preparing proposals and completing funding applications. This leads to the next challenge of recruiting volunteers. A current pressing matter is the small number of dedicated volunteers being spread increasingly thin. New volunteers are hard to come by and finding strong volunteers is even more difficult. Creating awareness is critical in attracting volunteers and funders. Promoting and increasing awareness of organizations is a challenge. The final challenge identified in the report is the ability to access affordable, flexible, and coordinated training and professional development opportunities. Training for staff and volunteers increases effectiveness and accountability, and helps to attract and retain good people.

There are many challenges that volunteer boards face today but if they are able to recruit and retain qualified board members this will allow them to have a strong board that, has the capacity to problem solve and navigate challenges.

Governance of Volunteer Boards

There is an increased need for the appropriate governing of non-profit organizations, given the challenges as previously discussed, and pressures facing these organizations. Such examples could include an increased reliance by governments on non-profit groups to fill service delivery gaps, increased competitiveness for fundraising dollars, and a decline in the number of

people volunteering their time to help run these organizations (Hoye & Inglis, 2003). An example of increased reliance on non-profit organizations is the transfer of ownership and management of lighthouses across Canada from Department of Fisheries and Oceans (DFO) to volunteer organizations.

So what is governance? Tricker (1984, p. 7) stated “if management is about running a business, governance is about seeing that it is run properly.” Governance involves having a defined role for the organization and clear responsibilities for board members. It is about how the board is structured (number of members, position on the board) and the composition of the board (skills sets of the board members). It also, involves having defined operating procedures and policies. All of these components that are part of board governance help to determine the board’s informal culture (Murray, 2005).

There have been many models developed on how best to govern. The most well-known is likely John Carver’s (1997) policy model. However, a consistent theme in the literature is that there is no one-size-fits-all model of board governance (Bradshaw, 1998; Milleson, 2010). Decisions about governance must be based on the configuration of personalities, culture, and environment of each non-profit organization (Brudney & Murray, 1998).

Authors such as Green and Griesinger (1996), and Herman and Renz (1999) have established a relationship between board effectiveness and organizational effectiveness through empirical research. Green and Griesinger (1996) examined the tasks and responsibilities of non-profit boards of directors and explored the relationship between board performance and organizational effectiveness. Thirty-three activities in nine areas of board responsibility were examined through questionnaires and interviews with the board members and chief executive officers of sixteen non-profit organizations which served developmentally disabled adults.

Rankings of organizational effectiveness were determined using external evaluators and accreditation surveys. Herman and Renz (1999) focused on a subset of especially effective and less effective non-profit organizations through surveys. Herman and Renz's results showed that the especially effective organizations, as judged by multiple stakeholders, had more effective boards, as judged by different multiple stakeholders, and that the more effective boards use significantly more recommended board practices. Bradshaw, Murray and Wolpin (1992) reconfirmed this link through a study of 400 non-profit organizations in Canada. Collectively, these findings reinforce the majority of the literature which advocates for improving the governance of non-profit organizations (Carver, 1997; Drucker, 1990; Houle, 1997). The literature agrees that attempts to improve board governance and effectiveness are worthwhile as such interventions can improve the overall effectiveness of the organization. As volunteer boards face increasing challenges it is important for them to continually look at ways to increase effectiveness. However, as there is no right answer on how to do this, it can be an additional challenge for a workgroup board. Workgroup boards are usually focused on the daily operations of the organization and do not take the time or have the time to consider governance or board effectiveness.

Another interesting finding regarding governance is that crises are important in stimulating change in board behavior (Cornforth, 1995). It often can take trigger events or problems to convince decision makers that they must initiate change in board governance. Also, for effective change to occur, it matters which players attempt to initiate the change. Unless those with power and influence see the need for change, the process may go no further (Brudney & Murray, 1998). Often such key players are the paid executive directors of an organization. However, for a workgroup board it would have to consist of volunteer members who show the

drive and influence to motivate such change. These volunteers could be considered “core volunteers” (Conn & Barr, 2006). Leading change in the absence of paid executive staff would appear to be more difficult, as such efforts to improve would take additional time and energy that workgroup boards do not often possess. Nevertheless, improving governance can help boards create more effective organizations.

Creating Effective Non-profit Organizations

The major challenge in the study of board effectiveness is the lack of criteria for defining and measuring board effectiveness (Herman & Renz, 1997). Much of the research pertaining to board effectiveness concerns ways to measure effectiveness. For example, one prominent study of effectiveness has distinguished several models of measurement including systems resources, internal processes, multiple constituencies, competing values, legitimacy, and fault-driven (Cameron, 1986). However, these academic measures may be overwhelming for volunteer organizations. Consequently, Herman and Renz (1999) argued that non-profit organizations can and should focus on goal achievement as the definition effectiveness. This means that volunteer boards must take the time to set goals and re-examine their goal status on a regular basis.

Although there is no specific behavior that seems to identify effective boards across all studies (Herman & Renz, 1999), some of the widely agreed upon board processes that appear to improve effectiveness include (Cornforth, 2001):

- The board has a clear understanding of its role and responsibilities.
- The board has the right mix of skill and experience, and board members have time to do the job well.
- The board and management share a common vision of how the organization should go about achieving its goals.

- The board and management periodically review how they are working together.

The more effective organizations are, the more likely they are able to attract quality people to their boards (Herman & Renz, 1999). Therefore, it is important for volunteer boards to continually look at ways to improve effectiveness such as human resource management practices to address their major challenge in recruiting and retaining qualified board members.

Human Resource Management Practices

As the responsibilities of volunteer boards grow, many organizations are looking at human resource practices as a way to improve effectiveness. There are many human resource practices that can be used to improve an organization some of which are referred to as best practices. However, rather than adopt what are alleged to be best practices, every organization must discover and continually seek to improve its practices, consistent with its values, mission, and stakeholders expectations (Herman & Renz, 2004). Some examples of human resource management practices that are suggested to improve effectiveness include recruiting and selection, training and preparing, monitoring performance, and removing ineffective board members (Brown, 2007). Such practices follow the theory that human resource practices are important to non-profit organization due to the pressures to become more efficient to deal with limited resources such as volunteers and funding (Akingbola, 2006).

Methods

The methodology for this report is based on qualitative research. In order to establish credibility, data triangulation was utilized. Data triangulation requires collecting data from several sources (Hair et al., 2011). The sources used herein were personal observation, focus groups, and interviews. Questions for the focus groups and interviews were formulated with guidance from Hair, Babin, Money, and Samouel (2003), and McCracken (1988).

Observation

Ten community development groups (76 volunteers) in Eastern Prince Edward Island were observed during regular interactions with the author. This represents a convenience sample as Active Communities has a strong relationship with them and they were readily available to participate in the study and provide the information required (Hair et al., 2003). As an employee of ACI, I have the opportunity to observe these groups in their natural environment (ethnographic research) and narrative data was collected. This observation was a continuous process through the life cycle of this research report.

Focus Groups

Based on what I observed, and what I had learned through the literature review, semi-structured focus group questions were developed (Appendix A). This approach allowed me to ask respondents open-ended questions on a chosen topic. Respondents could answer with as much or as little detail as they choose. This interview style allows respondents to elaborate on issues that are of most concern or interest to them, and to use detailed examples and personal stories to convey their thoughts and feelings. The reason for holding focus groups instead of individual interviews was to allow for volunteers to expand on each other's comments and develop a strong dialogue. The focus groups were recorded and I acted as moderator. As moderator, I asked open-ended questions, probed for additional information, and kept the conversation on track.

To engage focus group participants, e-mail invitations were sent to the boards of the ten organizations that were subjects of the observation research. Seventy-six e-mails were sent out with an invitation to two focus groups located in Montague and Souris. Volunteers could attend whichever session was most convenient. Of the 76 invitations, 18 volunteers participated in the

two focus groups - ten in Montague and eight in Souris. The focus groups lasted two-to-three hours and were held during the month of February 2011. The focus group sessions were transcribed and themes were identified based on a detailed review of the transcripts. The themes were based on information provided by participants in concert with existing literature.

Interviews

A semi-structured interview was developed from the information gathered through the literature review and focus groups (Appendix B). Three professional consultants were interviewed who specialize, respectively, in community development and volunteerism, board governance and human resource management, and board development and adult education. The interviews lasted 45 minutes on average and were held in person. Notes were taken at each of the interviews. The three interviews were compared for similarities and, again, common themes were identified. The key objective of the interviews was to have the consultants identify what challenges they deemed to be the greatest for workgroup boards, and how to address these challenges.

Findings

Findings from Observation

The situations that were observed in the greatest number of organizations were that volunteer boards that have one or two members that were responsible for the majority of the work. This seemed to be for one of two reasons: 1) some board members don't understand their role and therefore do not contribute regularly or, 2) some individuals like to manage the direction of the organization themselves. The latter type of volunteer also tends to fit the description of core volunteers, defined in an article by Conn and Barr (2006) as volunteers who contribute at least 188 hours per year. Core volunteers are very dedicated and are often found on several

boards. These individuals can be motivated by their unique passion for the cause to which they contribute (Conn & Barr, 2006).

Many of the boards have great problems recruiting new board members. Consequently, they cannot be highly selective in focusing on the skill sets they most require. Poor fit between new board members' skills and interests versus board needs seems to contribute to many of the volunteer boards having problems retaining new board members. Although valuable, core volunteers can sometimes alienate new members if they do not make them feel included or welcome.

Due to the poor recruitment and retention rate, many core volunteers are forced or feel that they need to continue to volunteer for the organization for a lengthy period of time. These volunteers often become known as a valuable resource and are asked to participate on several boards. This can cause volunteer burnout.

Volunteer workgroup boards are frustrated with unproductive meetings and lack of general support they receive. Meetings often cover the same material repeatedly, tasks are not assigned, or timelines are not followed. This meeting ineffectiveness can cause volunteers to miss or skip meetings which results in lack of meeting quorum and consequent problems with carrying out business. Volunteers seem to be overwhelmed with the amount of work they are responsible for, including but not limited to funding applications, bookkeeping, and managing staff. There appears to be a desire for additional assistance and support.

A final observation is that some of the boards have had a change of focus which has not been addressed. The focus of this paper is community development organizations that exist in order to improve and enhance communities. Over the past 15 years many of these organizations have addressed their purpose by creating and building infrastructure project such as retail shops,

theatres, and marinas. Now these projects need to be managed which takes a great deal of time and effort. However, many of the groups still feel a need to develop, but with limited resources and government funding, this causes frustration among the boards. Some community development organizations' focuses needs to evolve from development to management and this has not been addressed. It would be useful for groups to hold planning sessions. The lack of clarity in the organization's role has made it very difficult to recruit and retain quality volunteers.

Finding from Focus Groups

The focus groups were informative and gave volunteers an avenue to voice their concerns, as well as hear what challenges other boards face. There were many similarities between the two sets of focus group responses. All of the attendees seemed enthusiastic about volunteering and have been doing so for many years. The majority of the focus group members were between the ages of 50-75 and there was an equal representation of women and men. To gain a thorough understanding of how to best help these volunteers become parts of effective boards, numerous topics were covered such as motivation, challenges, and suggestions for improvement.

Motivation of Volunteers

To determine how best to recruit and retain volunteers, it is important to understand what motivates them. The question that was asked to probe volunteers' motivation was, "why do you volunteer?" Many of the volunteers' motivations that were identified through the focus groups fell into the four internal motivation themes identified in the Butler et al. (1995) article discussed in the review of literature section.

A common theme among focus group participants was a desire to meet new people and be involved in the community after moving to a new location or moving back home after many

years. This would be an example of a social-outlet motivation and it appeared to be the most common reason to volunteer.

“I moved back to PEI after 30 years and felt that volunteering was a good way to reintegrate into the community.”

“I lived off-island for 20 years. When we came back my daughter was 5 years old and all our life revolved around her. I wanted something for myself to be involved in.”

“I lived away for 13 years when I came home all of the people I knew had lives of their own. I wanted to get involved. I had small children and got involved that way”

A number of volunteers stated that they volunteered for certain organizations out of a sense of duty or due to a past experience. These would be examples of obligation motivation (Butler et al., 1995).

“I have a family member that attends a particular organization. It has played a very important role in our family, so when I was asked to sit on the board I felt I should.”

“I always loved attending our local community fair as a child. It was some of my favorite childhood moments so when I became an adult I felt responsible to give back to my community.”

Several people stated the need to be involved in organizations with which they personally connect, or an altruism motivation (Butler, DePhelps & Gray 1995). As the definition of volunteering is giving one's time freely, and this time is valuable, it would make sense the volunteer would want to dedicate this time to something he or she believes in. Although other focus group participants identified other motivations, the underlying motivation is likely altruism.

“I always tried to be involved in an organization that I felt benefited the community and society.”

“Volunteering gives you a feeling of being involved and giving back to the community.”

Only two of people explicitly expressed the reason for volunteering as a self-interest motivation (Butler, DePhelps & Gray 1995). Self-reports, especially from focus groups, wherein participants’ responses are shared with a group may limit the extent to which participants revealed self-interest motivation. Nevertheless, other examples of benefits to volunteers were evident as reasons for volunteering (e.g., feelings of being involved; learning; sense of accomplishments).

“Someone once told me when I was younger that it would look good on my resume.”

“Once you start volunteering you gain a thirst for learning and what you can do for your community.”

A common trend that came out in this conversation was that many of the focus group attendees started volunteering at a young age. Also, many volunteers found that once they began volunteering it was hard to stop.

“I started volunteering for our community fair as a teenager; once I started I never stopped.”

“I started as an alter server and have been volunteering ever since. It is gratifying to see the impact you can make. It gives you a sense of accomplishment.”

Another common trend that appeared was that many of the volunteers became involved because they were asked to participate. This would not be considered an internal motivation, therefore, it was not considered to be part of the model identified by Butler et

al. (1995), however, they also recognized this as a trend. They stated, “the best recruiter is an enthusiastic, satisfied volunteer already involved with an organization” (p. 14).

“Someone asked [me] to volunteer. I thought it was very flattering that they thought of me. So I accepted and have volunteered ever since.”

“I was also asked to sit on a board. I found it hard to say no. But I’m glad I did it. It is nice to contribute to the community.”

The majority of the volunteers appeared to enjoy volunteering. Many of them have been volunteering for years and have belonged to numerous boards and organizations. All participants commented that they enjoyed contributing to their communities.

Challenges of Workgroup Boards

Although the majority of the focus group attendees expressed pleasure in volunteering, they also expressed frustration. As volunteers in rural communities, they felt they were faced with many challenges. This was a topic that became the main focus of our discussion. Throughout both of the focus groups, several themes emerged as prominent challenges that these boards faced. They included: poor time management and inefficiency, lack of clarity of roles and responsibilities, recruitment and retention, and lack of support. Indications of these themes they can be found in various comments made by focus group participants, even if they did not use the words explicitly. It was beneficial to cluster the comments into themes, which then demonstrated the similarities in the challenges identified in *National Study of Board Governance Practices in the Non-profit and Voluntary Sector in Canada* (Bugg, 2006). Although not all of the challenges were the same herein as in the Bugg report, the discrepancies could be due to the difference in the size of the organizations involved.

Poor Time Management and Inefficiently

The first theme identified by focus group participants was poor time management. This theme emerged from two challenges: first, volunteers felt their time was stretched among too many organizations; and second, that often their time is not well used. Volunteers' poor use of time could be linked to inefficiently run organizations. An example of this is poorly run meetings, which were identified as a specific challenge in the focus groups.

“Sometimes you have to pick and choose. There are too many boards and not enough volunteers. Sometimes one board has to suffer so you can attend another meeting.”

“I don't have a lot of time to give it, I want to make sure it's used efficiently and I find that I have very little patience for wasting time in meetings.”

“I find that a lot of board meetings are not well managed. They just cover the same thing every time. The time should be used more effectively.”

“Volunteers are valuable and so is their time. Time utilization is key.”

“It is very hard to find time during regular meetings to focus on board development or strategy. You are usually too busy doing the everyday work.”

“It is the chair's job to set the tone of the meeting. A lot of chairs don't have a clue on their role in running a meeting.”

Lack of Clarity of Roles and Responsibilities

The challenge of inefficiency can also be related to the challenge of lack of role clarity. Many of the volunteers felt that the overall mission of the organizations is unclear. This can cause confusion for individual board members, particularly relating to their committee roles and responsibilities. A major challenge that was expressed by the volunteers was that responsibilities of the board were not shared equitably among board members. This can cause volunteer burnout

for those carrying out the majority of the work, but it can also cause those volunteers who have little responsibility to lose interest.

“A lot of board members do not live up to their responsibilities equally.”

“It usually happens that 30% of the board does 70% of the work.”

“I can never understand why people volunteer to do things if they are not prepared to do the work. Maybe it would be good to have job descriptions for the volunteer positions so that people know what they are getting into.”

“As roles change from being a development board to a maintenance board, the boards are losing focus and energy.”

“I once joined a board but never really felt included and therefore had little responsibility and got bored.”

Recruitment and Retention

Many of the volunteers have been on their boards for many years and find it very difficult to recruit new volunteers. Recruitment was the major concern of the volunteers. The concern was not solely that of recruiting new volunteers but also about recruiting the right volunteers, people who are able (have the right skill set) and who are willing to contribute and take on a share of the responsibilities. Retention is also a concern due to inefficiencies within the organization or lack of acceptance new, especially young, board members may feel. New board members often get frustrated and leave. It appears that many of the challenges are interlinked. For example, ineffectively run meetings can cause frustration for board members creating additional retention challenges

“One of the biggest challenges is getting people who will contribute and not just sit there.”

“On one particular board I sit on the average age is 70+. The younger people’s ideas were not being recognized. Fresh blood is needed. We need productivity. We need some different people with different skill sets.”

“For organizations looking for new members a brief job description is a good idea. A lot of the volunteer boards don’t see them as a business and don’t see the need for such things. But many of our boards have grown into businesses.”

“When recruiting new volunteers the questions should be asked “what do you like to do?” Just because you’re good at one thing doesn’t mean that’s what role you’d really like to do. Need to match skills set but also allow volunteers to do things they enjoy.”

Support

The need for additional support was identified in the focus groups, particularly as organizations continue to grow and take on more responsibilities. They felt that government should be responsible for facilitating at least some of the support to make their roles easier.

“Additional support would be nice. It would be great if the province or someone could provide a development officer for every five groups or so, to assist them and help to keep them on focus.”

“It would be great to be able to access professional advice such as legal or accounting in order to make decisions.”

“Providing training would be of benefit. Everyone wants to be on a good board but don’t always know what to do. Training is needed orientation, mission, objectives and how a meeting should run.”

“Boards need resource people to help get them talking about how to make their boards better.”

“A lot of groups don’t have clear goals from the beginning, no real focus stated. Training to learn the tools to set goals and recruit new members would be useful.”

From this discussion it became clear that volunteers felt that training would be beneficial. Training would assist in equipping committee members with the tools to create an effective board. As one focus group attendee stated, “training would at least get board members to start thinking of these things, such as orientation, succession planning, goal strategy, etc.” Below are other suggestions that the volunteers identified when asked, “what can we do to make things better?”

- Recognition/Acknowledgement: Everyone likes to be thanked for doing a good job. Some kind of appreciation would help to retain and motivate volunteers.
- Social Gatherings: An opportunity to gather for a social occasion to familiarize fellow board.
- Job Descriptions and Orientation: This would provide realistic expectations for the roles and responsibilities. A good orientation makes a new volunteer feel welcome and provides a clear understanding of the organization.

Although many of the volunteers saw the benefit of governance practices, such as running effective meetings, orientation, recruitment strategy, etc., many did not recognize the word governance. Others felt that governance is something for more professional boards, not their community boards. Even though the majority of board members saw the benefit in learning about effective governance practices, the one they found most difficult was evaluation. It was felt that the word evaluation had a negative connotation, especially when referring to individual volunteers. It was argued that it was already difficult to recruit volunteers and an evaluation process might further complicate the process.

Finding from the Interviews

The purpose of the interviews was to get expert opinions on what was considered to be volunteer workgroup boards' greatest challenges, and more importantly, to gather recommendations on what can be done to assist, and by whom. The material gathered from each of the three interviews contained themes similar to those identified through the literature review and focus groups. The interviewees agreed with the challenges identified by the focus group and recognized two of the main challenges they observe when working with volunteer workgroup boards as:

1. Recruitment and retention of quality volunteers. Due to declining populations in rural areas and increased responsibilities of non-profit organizations, there are too many boards and not enough volunteers. As the focus group members stated, it is not just about obtaining volunteers but getting quality volunteers with the right skill sets and the time to commit to the job.
2. Lack of an organizational strategy. This lack of strategy affects the organization's ability to have a clear overall role and for volunteers to understand their individual responsibilities. This could be due to the fact that volunteers on workgroup boards are busy doing the daily work and have very little time to focus on the overall objective of the organization. Boards that attempt to be everything for everyone, rather than stay focused, virtually guarantees organizational ineffectiveness (Kaplan, 2001). This was also identified by the volunteers in the focus groups.

All three interviewees subscribed to the idea that the more people that have a positive experience as a volunteer, directly relates to their continued commitment and encourage of others to volunteers. It is of great importance to consider what the experts suggested to help the

challenges workgroup boards face and to foster positive experiences among the volunteer board members. Common suggestions identified during the interviews included creating a joint effort, assessing board development training, and setting organizational goals.

Due to the lack of quality volunteers and the vast amount of volunteer boards, it was suggested that communities should look at the roles these boards play to see if any of the responsibilities were being duplicated. If this is the case some of the organizations could combine. This would make the best use of volunteer time and skills. Resources like volunteers are valuable and limited and should be treated as such (Murk, 1990).

It was also suggested that, as many of the volunteers groups lack staff to assist them with the daily management of the organizations, several boards could join together to hire an administrative person that could assist the organizations with some of their management responsibilities allowing the groups an opportunity to focus on governance and strategy.

All of the interviewees agreed that training for the volunteers would be beneficial. However, two of three interviewees would be potential training providers, which could be construed as a conflict of interest. Nevertheless, the concept of training is validated in the research (Holland & Jackson, 1998, Logue 2001). Therefore, getting the perspective of people who provide board training is advantageous. Training can be provided to encourage volunteers to think about improving effectiveness within their organizations, and to provide volunteers with the tools to do so. Some possible topics that would address challenges identified in this paper could include:

- Recruitment Strategy: This could include the development of a recruitment committee whose role would include assessing skill sets required and preparing job descriptions.

- Orientation: This could include having an orientation package including by-laws, policies, and past meeting minutes. Also, a mentoring program could be developed to assist with orientation.
- Succession Planning: This could include developing terms lengths for board positions, a rotating board and sharing information.
- Effective Meetings: This could include developing agendas, assigning tasks, committee reports, etc.
- Roles and Responsibilities: This could include scheduled overall-organization role-planning sessions, and creating job descriptions.

It was suggested that since these particular boards have limited resources they could provide joint training sessions. Training not only helps volunteers work better, but motivates them to donate their time (Skoglund, 2006). The experts also suggest that workgroup boards do not get overwhelmed with (alleged) best practices or governance models but rather pick what tools suit their board best and make gradual efforts to improve.

Without overall goals or a strategy plan for an organization, it is difficult for volunteers to maintain focus. This causes difficulty for individual board members in understanding their roles within their organization and the division of responsibilities. People generally volunteer with the intention of doing a good job, so it is important to give them the opportunity to contribute through tasks that they feel are worthwhile. It is important when developing a strategy or setting goals for an organization that all board members participate and contribute. It is vital that there is buy-in from the entire board.

Although the volunteers at the focus groups did not like the word evaluation, the experts felt that a workgroup board requires an evaluation process. If not for individual volunteers, but

rather on how the board as a whole is working, based on the goals they have set. This will allow them to feel achievement when goals are reached and also to re-strategize and stay focused.

During the interviews it was stated that, in order for the boards to improve, there needs to be someone who recognizes that changes need to be made. In cases, this person is the executive director for staffed boards. Workgroup boards face similar challenges, but this is one of the places where they differed from staffed boards. With no executive director it is up to core volunteers who have influence within the board to identify the need and create buy-in. The experts also indicated that in order for boards to make changes they must dedicate specific time to this objective. Adding this to the regular agenda will be ineffective as it is easy to put it off as a future agenda item. The board should have a couple of meetings scheduled throughout the year that are dedicated to strategy, goals, and board development.

The final element that was discussed during the interviews was the need for additional support. It was suggested that in order for workgroup boards to improve effectiveness they require additional supports. It is neither realistic nor responsible to expect that once a volunteer is recruited that they can work without ongoing support (McCurley & Lynch, 2005). A general consensus was that government should provide support to these organizations. Volunteer organizations play pivotal role in providing crucial services, especially in rural PEI. It was felt that government should want to support these organizations, as they would not likely be able to replace these services if these organizations ceased to exist. Suggestions of how government could help were to provide training opportunities and facilitators for strategy planning sessions.

The process of improving board effectiveness is continuous. Volunteers must make an intentional effort to focus on processes needed to create good governance and management.

Recommendations

After reviewing the literature, conducting focus groups and interviews, and six years of observations there are several things that are clear about workgroup boards. Their major challenge is recruiting and retaining quality volunteers. It is also reasonable to conclude that volunteers are more likely to want to be involved with well-run, effective boards. The problem with many workgroup boards is the general commitment to management not mission, hence, they focus on is to be accomplished rather than the processes needed to sustain good governance (Mordaunt, 2004). Therefore, in order to recruit and retain quality volunteers, boards must make an intentional effort to improve. To enhance effectiveness, boards should pick the practices that best suit them. It is important that volunteers do not get overwhelmed by this process, especially since they do not have the staff resources to assist them, but to assign specific time to focus on efforts to improve. From the research it can be concluded that there are some steps that could be considered to improve the effectiveness within workgroup boards.

STEP 1: Motivate Core Volunteers - In order to initiate change within boards and create buy-in from the entire board it is important that core volunteers see the need for it. The focus groups may have started this process. A suggestion from one of the experts was to conduct a survey that would elicit interest with the volunteers regarding improvement efforts. It was suggested that examples of well-run boards be put forth as a successful so that boards can see how effective organizations are run and are achieved.

STEP 2: Training – In order for the boards to make the proper changes they must have the skills to do so. Volunteers require and demand training (Drucker, 1989). Training is especially important for workgroup boards as they do not have executive staff with the skills to help them. Workgroup board members must acquire the skills themselves. Currently, workshops

are being organized to help provide the skills volunteers could use to make required changes. Funding has been acquired from both the provincial and federal governments by Active Communities Inc. in order to hold several training sessions. A request for proposal was created to hire a facilitator who will create and conduct the workshops. Based on the challenges that were identified in this report, the following topics will be covered in the workshops (Appendix C):

- Roles and Responsibilities
- Effective Meetings
- Recruitment and Retention

The intention is that two people from each board will attend the workshops and bring the information back to the board. The workshops will provide volunteers with the skills to improve board efficiency. The workshops will be interactive to allow the volunteers to have the opportunity to relate the material to their own experiences. Handouts will be provided as reference material which can facilitate sharing among boards. To provide additional support the Provincial Community Development Officers and the REDO's Economic Development Officers will attend the workshops to provide aftercare support. They will be able to attend individual board meetings to provide assistance. It is the intention to hold several offerings of this series of workshops. Subsequently, a new series on different topics could be developed and offered several times. Training needs to be a continuous process.

STEP 3: Strategy Sessions - Volunteers demand that the non-profit organizations have a clear mission; one that drives everything the organizations does (Drucker, 1989). One of the topics in the training sessions will be organizational roles and the importance of implementing a strategy. It will be recommended that workgroup boards hold at least two annual meetings

which focus entirely on strategy planning. Although the volunteers did not like the word evaluation it is important that strategy sessions include evaluation. It allows the board to know how they are doing and what should be included in the next year's plans. The evaluation should include the entire board, not individual members. The Provincial Community Development Officers and the REDO Economic Development Officers could assist in this process. Also, as part of the board's strategy session they should look at organizations in their communities to identify and resolve any duplication of services. They should also look at their community and consider taking a more regional approach. As the population changes so should the definition of community.

STEP 4: Acknowledgement - As stated previously, volunteers are valuable resources and should be treated as such. Acknowledgements that are appreciated vary from volunteer to volunteer. It is often based on motivation. The focus groups showed that many volunteers began doing so for a social purpose so perhaps a gathering of some kind such as dinner to celebrate achievements and socialize would be of benefit. I am part of a board that awards a volunteer of the year award. I received the award eight years ago and it made me feel appreciated and I am still a part of that organization today. This topic can be addressed during the strategy sessions.

As stated earlier, volunteers provide essential services that government would not be able to administer if volunteer organizations ceased to exist. Government can play an essential part in the steps explained above. This leads to the final point that government needs to support volunteer organizations, not just with funding but with model policies and resources. The study completed by the Community Foundation of PEI identified this need by pointing to a deficiency on the Island compared to the other Atlantic Provinces.

Within Atlantic Canada, the provincial governments of New Brunswick, Nova Scotia and Newfoundland and Labrador have ministerial responsibility for the non-profit and voluntary sector that helps to ensure policy, promotion and other supports for the sector. Government stakeholders in Prince Edward Island recognize the importance of volunteer organizations and consider them valuable partners in service delivery, but this recognition is not supported through formal policies or a designated bureaucratic structure such as a voluntary secretariat (p. 1).

Volunteer organizations should lobby government for additional support. This support can help to create more effective boards which in turn could create more effective organizations. The more effective the organization the less government support (e.g., wage subsidy programs) may be required in the long run.

Conclusion

In conclusion, workgroup boards play a vital role in our communities by providing services and economic spin-off. Therefore, government support to enhance the effectiveness of workgroup boards is in the public interest. These groups face many challenges; the greatest one being obtaining quality volunteers who have the time to dedicate to the organization. It is the conclusion of this paper that if volunteer boards become more effective and efficient they will be able to recruit and retain more quality volunteers. Therefore, volunteer boards must make an intentional effort to improve board effectiveness. Boards must recognize the need for this change and designate specific time to focus on this topic. Training may assist the volunteers to obtain knowledge and tools to address their challenges and the issue of effectiveness. An important realization is that this is an on-going process and will not happen immediately. It will take time to identify the practices that suit an organization, to create commitment to these

changes within the board, and to implement and evaluate improvement initiatives. This is ongoing process and should be treated as such.

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Appendix A Focus Group Questions

1. What does volunteering mean to you?
2. What motivates you to volunteer?
3. How many years have you been volunteering?
4. Why do you continue to volunteer?
5. What are the best things about volunteering?
6. What are the worst things about volunteering?
7. Have you ever received any formal volunteer development training? If yes, what?
8. Do you think training would be worthwhile?
9. What are the challenges you face as a volunteer?
10. Who do you feel should provide you with additional assistance?

Appendix B Interview Questions

1. In your experience what are workgroup board's greatest challenges?
2. Through my focus groups the volunteers identified these common themes when discussing challenges: poor time management, inefficiently, lack of clarity of roles and responsibilities and difficulty in recruiting and retaining quality volunteers. Based on your experience, what can be done to address these challenges with their limited resources?
3. Do you feel that workgroup boards need additional support?

Appendix C

Workshop Series Summary

Workshop # 1 - Basic Roles & Responsibilities

Board members are volunteer leaders who play a significant role in the success of the organization and their community. They also have a set of important legal and ethical responsibilities, and understanding these responsibilities is critical to their organization's success. Effective board work is both more difficult and more critical than ever, therefore, understanding the board's role has never been more important.

What volunteers will learn?

This 3-hour workshop will introduce participants to the basics of their responsibilities as a board, individually and collectively. They will learn about:

- The purpose of a board
- The different types of boards
- Basic roles and responsibilities
- Writing job descriptions
- Sharing the workload
- Using subcommittees and task groups

Workshop # 2 - How to Run Effective Board Meetings

Effective meetings can create motivation among board members, improve the quality of decisions made, and inspire members to act. So why is it that many board and committee members state that meetings are too long, unfocused, and do not achieve results? Well-planned, productive meetings *are* possible, and in this 3-hour workshop you will discover how to make them happen.

What volunteers will learn?

- Preparing for the meeting: its purpose and agenda
- Running effective discussions during meeting
- Making decisions effectively based on the organization's mission
- Keeping effective records
- Determining next steps and follow-up
- How to ensure participants are prepared, present, and participate
- How to promote teamwork
- How to use rules of order or ground rules

Workshop # 3 - Recruitment and Retention

Volunteer involvement in rural communities on Prince Edward Island is an important part of the success of organizations. Finding and keeping the right people to create a well-rounded board with the right balance of skills and connections to the community is key. Volunteers are particularly critical for those organizations that have few staff, and very modest budgets. For many organizations, recruitment is a difficult task, yet with some basic tips and planning the task can be made easier.

What will volunteers learn?

During this 3-hour workshop participants will learn tips and get resources to help their organization:

- Get the right people on the board
- Identify what you want and need
- Target recruitment efforts
- Develop recruitment messages
- Plan ahead: How to do succession planning
- Bring on new people as volunteers
- Develop a process for recruitment and orientation of new members
- Motivate current members