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Investigating American Cancer Society Volunteer Experience

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INVESTIGATING AMERICAN CANCER SOCIETY VOLUNTEER EXPERIENCE

By

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A Professional Project submitted to the Faculty of the Graduate School,
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the Degree of Master of Arts in Public Service

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ABSTRACT
INVESTIGATING AMERICAN CANCER SOCIETY VOLUNTEER EXPERIENCE

Kari Liotta, B.S.

Marquette University, 2013

The nonprofit sector is crucial for a vital economy, and volunteers are at the core of many of these organizations. Research has shown many different factors related to nonprofit organization success, including volunteer management, recruitment, and retention techniques. This study adds to the current literature by investigating the American Cancer Society Relay For Life Advisory Team and explores what factors have led to the retention of these high-level volunteers, what skill-based trainings have they received throughout their volunteer career with the American Cancer Society, and what sentiment do the volunteers have toward receiving spokesperson training, facilitation training, and coaching training. Using a single, descriptive, instrumental case study design, an open-ended response questionnaire was disseminated to 31 current Relay Advisory Team volunteers. Through using coding analysis, four major themes were identified from the responses to the question “why did you begin to volunteer for the American Cancer Society?: having a personal connection to cancer; someone asked them to get involved; participants were looking for a way to give back and make a difference; and participants were looking for a sense of community and belonging. In analyzing the question “why do you continue to volunteer for the American Cancer Society?” three major themes were identified: the desire of a cure for cancer to be found, participants felt that the American Cancer Society is a reputable organization, and a belief in the mission of the American Cancer Society. Lastly, the volunteers had received a range of trainings in the past, and had a positive sentiment toward receiving spokesperson, coaching, and facilitation trainings in the future. The finding of this study can be used to inform American Cancer Society volunteer recruitment and retention techniques.

ACKNOWLEDGMENTS

Kari Liotta, B.S.

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Investigating American Cancer Society Volunteer Experience

The nonprofit sector is crucial for a vital economy, and volunteers are at the core of many of these organizations. As such, it is important to understand the success factors of a nonprofit organization and how to recruit and retain the volunteers that support them. The following paper first reviews the literature covering nonprofit success factors, the human capital of volunteers, and volunteer management. A case study based on the literature is conducted, investigating the American Cancer Society Relay For Life Advisory Team (RAT). Specifically, the research explores 1.) What factors have led to the retention of these high-level volunteers? 2.) What skill-based trainings have they received throughout their volunteer career with the American Cancer Society and 3.) What sentiment do the RAT volunteers have toward receiving spokesperson training, facilitation training, and coaching training? The findings from this study will be used to help inform future strategies surrounding recruitment, retention, and trainings of American Cancer Society Midwest Division volunteers.

Literature Review

The success of nonprofit agencies is both a reflection of and necessity for a strong economy. Similar to any business, there are many nuances to nonprofit leadership and success. Many and varied research studies have been done in order to identify qualities of a sustainable and successful nonprofit. The nonprofit sector, which is proliferating American life, has much to offer where the public and private sectors are falling short. Additionally, “the role of the nonprofit sector in a civil society is multi-faceted: protector of rights, enricher of lives, advocate for the voiceless, nurturer of youth, guardian of the future, watchdog for the environment, and haven for the destitute (Chen et al., 2009, p. 33). As such, it’s important for research to keep up

with this ever-growing sector in order to provide insight into current and proven strategies for success. Several interconnected themes emerge in reviewing the literature surrounding nonprofit success. These themes include the importance of mission and vision, innovation, and volunteer success factors including management, motivation and retention.

The foundation of any nonprofit is its mission statement. The mission statement should guide daily activity. McDonald's 2007 study found that "an organization's mission is positively associated with the organization's ability to focus on innovations that support its mission" (p. 271). As such, McDonald suggests that, based on the results of the study, managers of nonprofit organizations should place a great deal of emphasis on the organization's mission and new employees should be socialized into the value system of the organization immediately upon hire in order to encourage buy-in of the mission (2007). This claim has been supported by various other studies in the field. In their cross-case analysis of organizational histories, Kimberlin, Schwartz and Austin found that an organization's mission serves as a foundation for other successful strategies (2011). This study found that nonprofits are more likely to exhibit both growth and resilience when they demonstrate a commitment to investing in their infrastructure by developing systems that help them manage growth effectively, as their mission outlines (Kimberlin et al., 2011). Lastly, authors have also identified a nonprofit's mission as being a foundation for strategic leadership. Ireland and Hitt (1999) proposed six components of effective strategic leadership: determining the organization's purpose or vision; exploiting and maintaining core competencies; developing human capital; sustaining an effective organizational culture; emphasizing ethical practices; and establishing balanced organizational controls. The mission of an organization serves as a starting point for the aforementioned components of strategic leadership.

Many nonprofits would not exist or be able to carry out their mission without the help of volunteers. The importance of volunteers to the nonprofit sector was another theme that emerged from the literature regarding nonprofit success. In the aforementioned Ireland and Hitt study, they explain that volunteers are a large part of the human capital that they reference as a component of effective strategic leadership (1999). “Volunteerism is an important resource for nonprofit organizations. That is why the determinants of this resource flow are important underpinnings of the ability of nonprofit organizations to supply a whole range of goods and services” (Leete, 2006, p. 170). Research on volunteerism is plentiful and generally falls into three categories: volunteer management, motivation and retention.

The research shows that generally, nonprofits spend much more time and energy on their staff than on their volunteers. This is troublesome, however, considering volunteers far outnumber nonprofit employees. “Four out of five charities use volunteers in their activities, either in service to others or in helping to run the organization” (Hager & Brudney, 2004, p. 2). As the volunteers are the human capital used to carry out the mission of many nonprofits, a focus on volunteer management is important. Eisner, Grimm Jr., Maynard, & Washburn point out that the nonprofit sector can’t afford to mismanage volunteers, particularly in the current tough economy, as volunteers “can help nonprofits save money by providing technology services, developing programs, training staff, and conducting strategic planning, all without being paid a salary” (2009, p. 34). Eisner et al. explain that most nonprofits do not manage their volunteers effectively and go on to provide a strategic volunteer plan to combat this: 1.) Market research and community needs assessment, 2.) Strategic planning to maximize volunteer impact, 3.) Recruiting and marketing to prospective volunteers, 4.) Interviewing, screening, and selection of volunteers, 5.) Orienting and training volunteers, 6.) Ongoing supervision and management, 7.)

Recognition and volunteer development and 8.) Measuring outcomes and evaluating the process (2009). Other studies substantiate these claims. Grossman and Furano identify three elements as crucial to the success of any volunteer program: screening potential volunteers to ensure appropriate entry and placement in the organization; orientation and training to provide volunteers with the skills and outlook needed; realistic expectations of what they can accomplish; and management and ongoing support of volunteers by paid staff to ensure that volunteer time is not wasted (2002). Hager & Brudney found that a majority of charities have not adopted most volunteer management practices (2004). A conclusion to be made from the literature is that many nonprofits could significantly benefit from investing time and energy in developing a strategic and sustainable volunteer management plan.

In order to better manage volunteers, it's important to identify what motivates them. Chen et al. argue that nonprofit organizations often misinterpret what motivates their volunteers. "Volunteers want to become more involved in the organizations to which they give their time and effort" (2009, p. 35). Thoits & Hewitt (2001) argue that people "give service for a variety of reasons, for example, to learn new skills, to develop the self, to enhance self-esteem, to prepare for a career, to express personal values and community commitment, and even to reduce ego-conflicts or identity threats" (p. 117). Also, it's important to note that while volunteers help nonprofits, volunteer work also benefits the individual. Thoits & Hewitt claim that people with greater wellbeing invest more hours in volunteer service work, and volunteer work promotes positive wellbeing (2001). Many of the studies related to volunteer motivation point out a positive correlation between identifying motivation and retention of volunteers.

Significant research has been dedicated to volunteer retention. This makes sense, considering how important volunteers are to the nonprofit sector, based on the thought that it is

more efficient to keep volunteers than find new ones. Also, retention is important in order to create financial and brand loyalty. In 1998, the UPS Foundation study revealed that two-fifths of volunteers have stopped volunteering for an organization at some time because of one or more poor volunteer management practices. This point reiterates the importance of strong volunteer management. From their study on organizational socialization of volunteers, Hidalgo and Moreno claim that social networks with other members of the organization are quite important for volunteer retention, as that variable alone accounted for 23% of the variability of the intention to remain a volunteer. Also, there is a link between the supervision of volunteers by the organization (including staff support and volunteer training) on satisfaction and the maintenance of service. And lastly, the work that volunteers do is crucial to their retention. The work needs to be meaningful so the volunteers feel that they are making a real and positive contribution (2009). Hager and Brudney found that “charities that use volunteers to recruit other volunteers have higher retention rates. Having volunteers represent the charity implies trust, evidence of a positive organizational culture, and confidence that the charity provides a worthwhile experience for volunteers” (2004, p. 11).

Much of the research surrounding retention mentioned the importance of nonprofits training their volunteers. Haski-Leventhal and Bargal (2008) observed the uncertainty shown by some volunteers on the job usually stems from a lack of instruction and formal training so that their training within the organization is carried out informally by colleagues, trial and error or feedback from clients or users. Woodward expresses that it is no exaggeration to say that everyone in nonprofit organizations needs a formal training to perform effectively and successfully (2006). Lastly, Hager & Brudney (2004) claim “charities interested in increasing retention of volunteers should invest in recognizing volunteers, providing training and

professional development for them, and screening volunteers and matching them to organizational tasks” (p. 1). Studies across the board showed that the nonprofit field does not invest in training and development of volunteers, and staff who work with volunteers, even though the literature shows significant benefits of such. This presents an opportunity for further research. While there is research that shows the benefits of volunteer training, the literature is lacking in providing specific volunteer training strategies and techniques and asking why so many nonprofits fail to train their volunteers. The literature generally attributes a strong mission and vision, focus on volunteer management, and volunteer retention on nonprofit success. However, there is a gap in the research when it comes to how nonprofits may better utilize volunteer training in order to increase retention and the impact of volunteers.

Overview

The American Cancer Society Midwest Division Relay For Life Advisory Team (RAT) is composed of 30+ high level volunteers from the four-state division of Iowa, Minnesota, Wisconsin and South Dakota. The Midwest RAT develops and carries out the strategic plan of Relay For Life, the American Cancer Society’s signature fundraising event, at a grassroots level. The American Cancer Society is a national nonprofit organization. The RAT volunteers are asked to do a variety of tasks including coach local events, facilitate trainings and serve as a spokesperson for the Society. They are dedicated and long-term volunteers. This group is very well versed in Relay For Life and the American Cancer Society, however, they have never been formally skill-trained in the areas of facilitation, coaching or public speaking.

The current literature surrounding volunteer engagement shows that a volunteer’s intention to remain with an organization is impacted by socialization, support, meaningful work

and training. In order to better support and utilize this current group, and plan for future recruitment and retention strategies, the purpose of this case study is to gain greater insight into:

- 1.) What factors have led to the retention of these high-level volunteers?
- 2.) What skill-based trainings have they received throughout their volunteer career with the American Cancer Society and
- 3.) What sentiment do the RAT volunteers have toward receiving spokesperson training, facilitation training, and coaching training?

Methodology

A single, descriptive, instrumental case study design was chosen to investigate the research questions. A case study is appropriate in the context of the Midwest Relay Advisory Team because “a case study investigates a leadership phenomenon within its real-life context” (Klenke, 2008, p. 59). As quoted by Klenke (2008), “according to Yin (1994), case studies are the preferred approach when “how” and “why” questions are to be answered...” (p. 63). Such “how” and “why” questions are utilized in the questionnaire to address the research questions. Furthermore, the case study is descriptive because it is driven by theory found in the review of literature. I used existing theory to frame my research question and as an initial guide for design and data collection. This study is instrumental because the focus is on the dynamics of the issues and the need for a general understanding (Klenke, 2008). A case study also aligns with my research paradigm of interpretivism, which posits that there is no objective reality and seeks to produce “descriptive analyses that emphasize deep, interpretive understandings of social phenomena...” (Klenke, 2008, p. 23).

An open-ended response questionnaire was disseminated via Survey Monkey. The link to the questionnaire was sent in an e-mail to all of the current Midwest RAT volunteers. As such, a

purposive, nonprobability sampling method was utilized. The questionnaire was completely anonymous, as it did not ask any identifying questions and was not linked to the participant's IP address. It was sent to 31 volunteers, and 22 questionnaires were completed, resulting in a 71% response rate. Ages of the participants ranged from 21 years old to 64 years old, with a mean of 45 years old, median of 46 years old, mode of 46 years old and a standard deviation of 12.06.

Four of the participants were

male, the rest female. The participant's length of membership on the Midwest RAT ranged from 1 year to 13 years.

To address the first research question of "What factors have led to the retention of these high-level volunteers" two open-ended questions were utilized on the questionnaire: 1.) Why did you begin to volunteer with the American Cancer Society and 2.) Why do you continue to volunteer with the American Cancer Society? To analyze the responses collected, I read through the responses of the two questions separately several times in order to develop a general sense of what the participants were saying, and to establish initial themes. I then created word clouds representative of each of the collected responses and cross-checked that with the initial themes. The adjusted general themes were then broken down into specific components, or codes. Specific thoughts or examples from the responses were associated with each code. This qualitative analysis resulted in a conceptualization of the responses, which are discussed in the findings.

The remainder of the questionnaire addressed the last two research questions: "What skill-based trainings have they received throughout their volunteer career with the American Cancer Society?" and "What sentiment do the RAT volunteers have toward receiving spokesperson training, facilitation training, and coaching training?" The questions asked are as follows:

- What trainings have you received from the American Cancer Society, if any?
- Have you ever received training on being a Spokesperson? Yes/ No (check one)
 - If so- briefly explain what the training entailed:
 - Was it helpful in your role on the Midwest Division Relay Advisory team?
 - If you have not received this training, would you be interested in receiving one? Yes/No (check one)
 - Why?
- Have you ever received training on being a coach to other Relay For Life events?
 - If so- briefly explain what the training entailed:
 - Was it helpful in your role on the Midwest Division Relay Advisory team?
 - If you have not received this training, would you be interested in receiving one? Yes/No (check one)
 - Why?
- Have you ever received training on facilitating trainings?
 - If so- briefly explain what the training entailed:
 - Was it helpful in your role on the Midwest Division Relay Advisory team?
 - If you have not received this training, would you be interested in receiving one? Yes/No (check one)
 - Why?
- Rank which learning methods you prefer- 1 is most preferred, 3 is least preferred method
 - In Person Meeting
 - Online E-Learning
 - Conference Call
- How much time would you be willing to commit toward Spokesperson Training: _____ Hour(s)
- How much time would you be willing to commit toward Coaching Training: _____ Hour(s)

- How much time would you be willing to commit toward Facilitation Training: _____ Hour(s)
- Are there any trainings not mentioned that you would be interested in being a part of through the American Cancer Society and the Midwest Relay Advisory Team?

Findings

Through using coding analysis, four major themes were identified from the responses to the question “why did you begin to volunteer for the American Cancer Society?” The first theme is having a personal connection to cancer. Whether it is themselves who had been diagnosed or a family member or friend, this connection to cancer was an overwhelming theme to why individuals first began volunteering. Another theme, quite simply, is that someone asked them to get involved. The third theme identified is that participants were looking to give back and make a difference. Lastly, a theme that emerged from the responses included looking for a sense of community and belonging.

In analyzing the question “why do you continue to volunteer for the American Cancer Society?” three major themes were identified. The first is the desire of a cure for cancer to be found. Another theme identified is that the participants felt that the American Cancer Society is a reputable organization. Lastly, the participants expressed a belief in the mission of the American Cancer Society.

The participants expressed receiving various trainings at National, Divisional, local and individual training events. Trainings received included leadership, advocacy, recruitment, meeting management, spokesperson, and fundraising. Forty five percent (10) of the participants identified as having had training on how to be a spokesperson for the American Cancer Society. The training they received entailed knowing the mission of the American Cancer Society, making a personal connection, and including important information. Those who have had the

training identified it as being beneficial to their current RAT volunteer role. Of those who had not had the training, 93% (20) of the respondents expressed an interest in participating in a spokesperson training in the future. Forty percent (9) of the participants responded that they had received training on being a coach in the past. The training they received entailed experiential learning, case studies, a focus on empowerment and mentorship. Those who have had the training identified it as being beneficial to their current RAT volunteer role. Of those who had not had the training, 94% (21) of the respondents expressed an interest in participating in coaching training in the future. Twenty seven percent (6) of the participants responded that they had received facilitation training. The training they received entailed room management, presentation style, and experiential learning. Those who have had the training identified it as being beneficial to their current RAT volunteer role. Of those who had not had the training, 88% (19) of the respondents expressed an interest in participating in a facilitation training in the future. In-person learning methods ranked more preferable, with online e-learning being second and a conference call least preferable. Trainings regarding the mission of the American Cancer Society and their specific programs and services was mentioned as being a training respondents would be interested in participating in.

Discussion

The findings regarding why RAT volunteers began volunteering with the American Cancer Society, and continue to volunteer, provide interesting insight into how to potentially recruit and retain volunteers in the future. It isn't surprising that a personal connection to cancer was a theme gleaned from participant answers. This aligns with the literature surrounding the topic, including alignment of values with the organization. The importance of a connection to

cancer should be considered when developing recruitment strategies in terms of both where to recruit and speaking points for recruitment. The second theme, ‘someone asked them to get involved,’ is surprising in its simplicity. However, the implications of this could be great. Simply asking others to become involved may be overlooked in the jargon and scripts of recruitment that the American Cancer Society currently utilizes. This is an excellent example of how the core of recruitment is relationship building. The last two themes, ‘looking to give back and make a difference and ‘looking for a sense of belonging,’ informs both recruitment and retention strategies. This finding suggests that RAT leadership need to ensure a culture that promotes a sense of belonging and community while also providing meaningful work, as the literature suggests. One way to take a pulse on how well the RAT leadership is providing those needs is by continually checking in and simply asking the volunteers how they feel about their experience and what suggestions they have for improvement.

Asking the participants why they continue to volunteer with the American Cancer Society helps to inform the research question of what factors have led to the retention of these high level volunteers. While the responses still echoed some of their answers to why they began to volunteer in the first place, the themes that emerged were more specific to volunteering with the American Cancer Society than to volunteering in general. The first theme, ‘a desire for a cure for cancer to be found’ is different than the previous theme of having a personal connection to cancer. This is more specific and is a lofty goal that they are working toward through their volunteerism. It may be interpreted that these volunteers feel empowered through their work and believe that what they are doing through volunteering with the American Cancer Society is contributing to finding a cure for cancer. The participants identified the American Cancer Society as being a reputable organization. This first shows that the reputability of the

organization is important. Since this was not mentioned in the responses to why the participants began to volunteer, it may be interpreted that they learned about the reputability of the organization after they began volunteering. In terms of practical implications, it is important for the American Cancer Society to continue to be a reputable organization in order to not only meet its mission, but also to retain volunteers. Lastly, the participants expressed a belief in the mission of the American Cancer Society. This theme also encompasses the prior two mentioned of finding a cure for cancer and the reputability of the organization. The connection of the mission to the work of the RAT volunteers mustn't be overlooked. Being intentional of always connecting the work asked of the volunteers to the mission is one strategy that may achieve this. Also, conducting a mission-specific training for the RAT volunteers that focuses on programs and services would be a way of providing a foundational base for the volunteers once they reach that level.

The Midwest RAT volunteers are asked to conduct a variety of tasks and projects including coaching struggling Relay For Life events, being a spokesperson for the organization, and facilitating local trainings. The RAT leadership has received mixed reviews on the RAT volunteer output in those categories. The literature reveals that training volunteers is one way to not only keep volunteers engaged, but also to build confidence and execute work successfully. This research sought to gauge the RAT volunteer's attitude toward receiving training on being a coach, being a spokesperson, and facilitating trainings. If they are not interested in participating in those trainings, then it would be futile to design and execute the trainings. The findings reveal that the majority of the volunteers have not received those trainings, and the volunteers who had did find them to be helpful in their role as a RAT volunteer. Even more, there was a strong positive response showing an interest in receiving all three of the trainings in the future. If

possible based on the travel budget allotted, an in-person meeting dedicated to spokesperson, coaching, and facilitation would be well received in the future and beneficial toward carrying out the mission of the American Cancer Society at a grassroots level.

Conclusion

The findings from this study align with the literature regarding volunteer motivation and retention. Four themes emerged explaining why Midwest Relay For Life Advisory Team members began volunteering with the American Cancer Society: a personal connection to cancer, someone asked them to get involved, they were looking to give back and make a difference, and were looking for a sense of community and belonging. They continue to volunteer because they would like a cure to cancer to be found, believe in the mission of the American Cancer Society, and believe that the American Cancer Society is a reputable organization. Furthermore, these high-level volunteers are interested in receiving skills-based trainings on being spokesperson, facilitating trainings, and coaching.

While this study adds to the current literature surrounding volunteerism, there are a variety of limitations to the study. First, the questions asked were very specific to the American Cancer Society and the Midwest Relay For Life Advisory Team volunteers. As such, findings from this study may not represent other volunteer experiences within the American Cancer Society or among other nonprofit organizations. While the findings explained why the RAT volunteers continue to volunteer, the questions on the questionnaire did not lead to suggesting what *factors* led to their continued involvement, which is what one of the original research questions was. Furthermore, the design of the research only scratched the surface of the RAT experience. A follow-up study utilizing in-depth, semi-structured interviews could add to the

depth of content. To enrich the case study further, documents relating to the RAT could also be analyzed.

While there are significant limitations to this research, it does provide a solid foundation for further inquiry. Further research may be done on the RAT experience. Also, a review of the literature surrounding volunteer training, adult learning, coaching, training facilitation, and spokesperson training can be used to develop facilitator guides for RAT trainings in the future. This research study will help inform future volunteer recruitment and retention methods for the American Cancer Society Midwest Division.

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Appendix A: Institutional Review Board Protocol Summary Form

Institutional Review Board Protocol Summary Form

Directions: Submit this completed Protocol Summary Form with original signature(s) along with any additional materials, including consent forms, information sheets, surveys, interview questions, etc.

Submit to: Office of Research Compliance, 560 North 16th Street, Room 102, Milwaukee, WI 53233

Phone: 414-288-7570 **Fax:** 414-288-6281 **Web site:**

<http://www.mu.edu/researchcompliance>

Type of Review being sought: Exempt Expedited Full Review

- Exempt Review:** Submit **originals** of all materials; 1 copy of grant application.
Expedited Review: Submit **originals AND 1 copy** of all materials; 1 copy of grant application.
Full Review: Submit **originals AND 14 copies** of all materials; 1 copy of grant application.

Principal Investigator: *Kari Liotta*

Department: *School of Professional Studies*

Phone: *847-532-0826*

E-mail: *kari.liotta@marquette.edu*

Project Title: *Suggested Trainings for American Cancer Society Midwest Division Relay Advisory Team Members*

PI Certification

By signing below or submitting this document electronically, I agree to accept primary responsibility for the scientific and ethical conduct of this project as approved by the IRB. The project cannot begin until I receive documentation of IRB final approval.

Kari Liotta

10/15//2012

Signature of Principal Investigator

Printed Name

Date

FOR STUDENTS, a Marquette faculty supervisor's signature is required or this document must be submitted electronically by the supervisor. **Faculty Supervisor:** By signing below or by submitting this document electronically, I certify that I have reviewed the research plan and this

document and I have approved the scientific and ethical aspects of the project. I will supervise the above listed student and ensure compliance with human subjects' guidelines.

Signature of Faculty Supervisor

Printed Name

Department

*****Please note that in order to choose any of the check boxes on this form, you must double click the box and select "Checked" as the Default Value*****

Section A: RESEARCH PROJECT CHARACTERISTICS

1. This is a:

- Research Proposal
 Thesis/Dissertation
 Class Project (list Dept. & Course #):
 Other (specify):

2. Grant or Contract Funded: Yes Funding is Pending No

Sponsor/Source of funding:

If external funding, have you registered your project with Research and Sponsored Programs (ORSP)? Yes No

If Yes, Please list your ORSP Reference #: _____

If your project is grant funded, submit a copy of the funding/grant proposal and list the AGENCY GRANT NUMBER: _____

If the project title listed on page 1 of this application is different from your grant title, list the grant title: _____

If the funding agency requires an official IRB approval letter or form, list the program area, contact person, title and complete mailing address:

3. Does the investigator or key personnel have a potential financial conflict of interest in this study that should be disclosed?

Yes No If Yes, Please explain:

4. PI Status:

- Undergraduate
 Graduate
 Faculty/Administrator
 Other (specify):

5. Provide the names, titles and affiliations of **all** investigators (include yourself, co-PIs, other investigators, and students). Please use an attachment if more space is required.

OHRP interprets an “investigator” to be any individual who is involved in conducting human subjects research studies. Such involvement includes:

- obtaining information about living individuals by intervening or interacting with them for research purposes;
- obtaining identifiable private information about living individuals for research purposes;
- obtaining the voluntary informed consent of individuals to be subjects in research; and
- studying, interpreting, or analyzing identifiable private information or data for research purposes.

Note that any collaborative work with another institution will require the submission of that institution's IRB approval letter.

Name	Institution	Status (Faculty, Grad., Undergrad., etc.)	Project Role (Co-PI, Key or Non-Key Personnel, Consultant, etc.)	Contact e-mail	Tutorial* (Attached or On File w/ MU ORC)
Kari Liotta	Marquette University	Graduate Student	Principle Investigator	Kari.Liotta@marquette.edu	On File

***Please note that Training Certificates are required for all human subject investigators. Certificates can be obtained by visiting <http://phrp.nihtraining.com/users/login.php> and completing the IRB Tutorial Designed by the National Institute of Health. Copies of Training Certificates are to be forwarded to the Office of Research Compliance.**

6. Do you wish to have this project considered for Exempted Review?
 Yes No (See Submission Requirements on ORC web site for definition and list of categories)

If Yes, identify the Exemption category number you believe covers your project:
 Category 1 Category 2 Category 3 Category 4
 Category 5 Category 6

Explain your basis for this level of review here: *The research involves survey procedures conducted in a manner in which subjects can't be identified. Also, there will be no disclosure of subject's responses outside of the research.*

7. Do you wish to have this project considered for Expedited Review?
 Yes No (See Submission Requirements on ORC web site for definition and list of categories)

If Yes, identify the Expedited Review category number you believe covers your project:

- Category 1 Category 2 Category 3 Category 4
 Category 5 Category 6 Category 7

Explain your basis for this level of review here:

8. Inclusive dates of Project: (Project may not start prior to approval)

From: **IRB Approval Date** To: **May 1, 2013**

9. How long is the active involvement of participants in the study? (e.g. six half-hour sessions over six months): **Approximately 15 minutes for the participants to complete the survey once.**

10. Research Location: Where will the research be performed (if not on campus, please provide the full address; if online, please indicate online)? **Online**

Note: If the research will be conducted in a school or institution other than Marquette University, include a letter, on letterhead stationery, of permission from that institution and/or its IRB. This letter must be received by the ORC prior to IRB approval.

11. What do you intend to do with the data collected?

- Publish paper Present at conferences/meetings
 Other (please describe): **Use for Professional Project for graduation**

Section B: SUBJECT RECRUITMENT

12. Indicate which of the following specially protected groups will be specifically targeted as research participants in this study (Check all that apply):

- Pregnant Women/Fetuses Children (minors under 18) Prisoners
 None of These

13. Indicate which of the following potentially vulnerable populations will be specifically targeted as research participants in this study (Check all that apply):

- College Students* Institutional Residents Cognitively Impaired
 Physically Disabled Terminally Ill None of These

***If using Marquette students, please consult HRP Policy 98.102 Participation of Students and Employees in Research**

<http://www.marquette.edu/researchcompliance/human/documents/HRPolicy98.102-StudentsEmployees.pdf>

14. Will both genders have an equal opportunity to participate as subjects in this research project?

Yes No If No, explain your answer:

15. Will subjects of different racial and ethnic consideration have an equal opportunity to participate in this research project? Yes No If No, explain your answer:

16. How many subjects will be recruited into your research project as justified by the hypothesis and study procedures?

a) Total number of subjects required to complete your study: 30

How was this number determined? If a power analysis or other method was used, please include this in your response: This is a qualitative descriptive study, making a sample size of 30 adequate.

b) Total number of subjects to be recruited (to account for drop out, etc.): 40

c) Explain the reason for difference between (a) and (b) above (e.g. past studies have shown that there is a 50% drop out rate for students, the study is longitudinal and a drop out rate

d) of 30% is anticipated): ***It is expected that not all Relay Advisory Team members will complete the survey and it is also expected that a certain number of surveys will not be usable. However, a high completion rate is anticipated.***

Please Note: If at a later time it becomes apparent that you need to increase your sample size, you will need to submit an IRB Protocol Amendment Form, including your justification for additional subjects.

17. What is the age range of subjects (please provide a specific range)? ***18 years old +***

18. What is the source of the subject list? ***Relay For Life Advisory Team Members (volunteers) from each of the 4 states in the Midwest Division of the American Cancer Society: Wisconsin, Minnesota, Iowa and South Dakota***

19. Who will contact the subjects (name and affiliation)? ***Kari Liotta, Marquette Graduate Student, College of Professional Studies***

20. How will subjects be contacted? (Check all that apply)

Advertisements*

Letters*

Notices*

Telephone Lists

Student Pool

Random Telephone

Dialing

Direct person-to-person solicitation

E-mail*

Other (please specify):

University News

Briefs*

*** A copy must be submitted for IRB approval. For letters, notices, advertisements, and others, submit verbatim copies.**

21. Data collection methods: (Check all that apply and provide copies of all tools)

- | | | |
|--|---|---|
| <input checked="" type="checkbox"/> Questionnaire or Survey ¹ | <input type="checkbox"/> Observation ⁴ | <input type="checkbox"/> Interview |
| <input type="checkbox"/> Archival Data ² | <input type="checkbox"/> Intervention | <input type="checkbox"/> Video Recording ³ |
| <input type="checkbox"/> Instruction/Curriculum | <input type="checkbox"/> Focus Groups | <input type="checkbox"/> Audio Recording ³ |
| <input type="checkbox"/> Testing/Evaluation | <input type="checkbox"/> Other (please describe): | |

¹ **If conducting an online survey, consult the University's Online Survey Policy**

(<http://www.mu.edu/upp/documents/upp1-22.pdf>)

² **If using archival data, describe in the Narrative section (question 48) whether data are de-identified.**

³ **If you select video and/or audio recording, please provide further explanation in the Narrative section (question 48) regarding confidentiality of the recording(s).**

⁴ **If you select observation, please provide further explanation in the Narrative section (question 48) regarding who you plan to observe, where you plan to observe (public or private location), and the type of data you will be collecting.**

NOTE: If data collection tools are provided in a language other than English, provide both the English and non-English versions.

22. If deception or experimental manipulation is used, please explain why it is necessary (as opposed to convenient) for this study. Include plans for how and when subjects will be debriefed and attach a copy of your debriefing sheet, if applicable: *Not Applicable*

23. Does any part of this activity have the potential for coercion of the subject (for example, a student being recruited by a teacher who controls his or her grade may feel coerced)?

- Yes No

24. If Yes, explain and describe the proposed safeguards:

Note: If you are planning to recruit Marquette employees or students, consult the HRP Policy regarding Participation of Students and Employees in Research

(<http://www.marquette.edu/researchcompliance/human/documents/HRPolicy98.102-StudentsEmployees.pdf>)

Section C: CONSENT OF RESEARCH SUBJECT

25. What type of consent will be used? You must attach a clean copy that will receive the IRB approval stamp. Consult the ORC website for the consent form instructions and required template.

- Written Consent Waiver Online Consent

- Oral Consent Information Sheet Parent Permission & Child Assent
 Guardian Permission & Adult Assent Other (please describe):

26. If you are requesting a waiver of informed consent, address each of the following:

- a) The research involves no more than minimal risk to the subjects;
- b) The waiver will not adversely affect the rights and welfare of the subjects;
- c) The research could not practicably be carried out without the waiver; and
- d) Whenever appropriate, subjects will be provided with additional pertinent information after participation.

Considering the above requirements for a waiver of informed consent, please describe how your research qualifies for this waiver: ***The research meets all four qualifications for a waiver of informed consent.***

27. Do you intend to use an informed consent document in a language other than English?

- Yes No If Yes, provide both the English and non-English versions.

28. If you are using an oral consent, describe the rationale, how it will be documented, and include a copy of the oral presentation; it must include all information required of written informed consents: *N/A*

Section D: CONFIDENTIALITY

29. Where specifically will consent forms be kept (building location, room #, please include full address if off campus) **AND** who will have access? *N/A*

30. How will research subjects be identified in the research data (by name, code, number, etc.)? ***The data will be presented in an aggregated format, so research subjects will not be identified. Also, the surveys they take will be anonymously submitted using Survey Monkey.***

31. At any time during your research will a direct link exist between collected data and research subjects? (i.e. participants' data can be directly linked to their name). For example, data collection sheet has a location for participant's name to be recorded.

- Yes No

At any time during your research will an indirect link exist between collected data and research subjects? (i.e. participants' data can be indirectly linked to their name.) For example, data collection sheet has a location for subject number to be recorded. In addition, a spreadsheet exists that links that subject number to a participant's name. Many multi-session and longitudinal studies use indirect links.

- Yes No

If either of the two above questions are answered "yes," please describe the provisions for security of any links:

32. When data results are reported/disseminated:

Will identifiers be used (for example: participant's name will be published in article)?

Yes No

Will it be presented in aggregate form (For example: Group characteristics only=Yes, Individual Quotations=No)?

Yes No

33. Will research data (raw data) be available to anyone other than the IRB, sponsor and study personnel?

Yes No

If Yes, who will this data be shared with, describe how the data will be safeguarded, and be sure to include this information in the consent form (if applicable):

The raw data, which does not have any identification associated with it, will be shared with the American Cancer Society staff partner with whom Kari Liotta is working on her professional project.

34. Describe how research records, data, electronic data, **(including deidentified data)** etc. will be stored (i.e. locked file cabinet, password protected computer file, etc.) **AND** for how long (research records must be maintained a minimum of 3 years; if kept indefinitely, please state this and indicate it on the consent form): ***The deidentified electronic survey results will be stored on Kari Liotta's personal computer, which is password protected, for three years.***

35. Describe how the research records, data, electronic data, **(including deidentified data)** etc. will be destroyed (i.e. shred paper documents, delete electronic files, etc.), **AND** address whether they may be used for future research purposes (If records will be used in the

future, please indicate this on the consent form): ***After three years, the electronic survey results will be destroyed by being permanently deleted from Kari Liotta's computer.***

36. Could any part of this activity result in the potential identification of child/adult/older adult abuse?

Yes No

If Yes, is the mandatory report of child/adult abuse outlined in your consent?

Yes No

37. Could any part of this activity result in the potential identification of communicable diseases or criminal activities? Yes No

Section E: BENEFITS AND RISKS TO RESEARCH SUBJECTS

38. Are the direct and indirect benefits to the research subjects for involvement in this project described in their informed consent form? Yes No

39. Describe the possible direct benefits to the subjects. If there are no direct benefits, please state this. Also, describe the possible benefits to society: *There are possible indirect benefits to the subjects, as the results of the survey will help to inform the trainings that the Relay Advisory Team members receive in the future. The possible benefits to society are minimal, however possible indirect benefits of the survey include having more engaged and impactful high level American Cancer Society volunteers, which may bring in more fundraising dollars to be used to help save lives against cancer.*

40. Will any electrical or mechanical systems that require direct human contact be used (does not include use of computers for data keeping and surveys)? Yes No

If Yes, attach a copy of the manufacturer's electrical/mechanical safety specification information for each instrument/device. If the device is custom made, attach detailed description/information on design and safety with respect to human subjects application.

*****Also include the most recent safety inspection information documented on either the [Marquette University Electrical Safety Testing Documentation](#) form or an equivalent electrical safety testing documentation form.**

NOTE: Electrical and mechanical safety inspections must be performed and documented on an annual basis. Documentation of the most recent safety inspection must be submitted with the initial protocol, as well as with any subsequent 3-year renewals.

41. Are the nature and degree of potential risks to research subjects described in the consent? Risks can be physical, psychological, economic, social, legal, etc.
 Yes No

42. Describe the risks to participants and the precautions that will be taken to minimize those risks (these risks should also appear on the consent form). If no risks identified, explain why: *There are minimal risks present, as the online surveys will be completely confidential and not linked directly to the subjects completing the survey.*

Section F: COMPENSATION FOR RESEARCH SUBJECTS

43. Will research subjects be compensated or rewarded? Yes* No

If Yes, describe the amount of compensation, how and when it will be disbursed, and in what form:

- * If subjects are recruited from MU classes, indicate whether students are receiving course credit (regular or extra credit) and, if so, what alternatives are offered to those students who do not wish to participate in the research.**

Section G: NARRATIVE DESCRIPTION

For the following questions, try to use **non-technical** language that provides a first time reader (from any discipline) with a clear understanding of the research, and avoid abbreviations. **Do not "paste" text from the grant proposal, and do not refer to the grant proposal page numbers or include literature citations.** Information given should provide the first-time reader with a clear understanding of the proposed research. Focus your answers on the involvement and treatment of human subjects.

PROPOSED RESEARCH RATIONALE

- 44.** Describe why you are conducting the study and identify the research question(s) being asked:

I am conducting the study for two reasons- one as a part of my professional project and secondly, as the chair of the American Cancer Society Midwest Division Relay For Life Advisory Team (RAT). In my volunteer position as the chair of the RAT, I lead high level volunteers in the four-state division in developing and carrying out the strategic plan of Relay For Life, the American Cancer Society's signature fundraising event. The 30 + RAT volunteers across the division are asked to do a variety of tasks including coaching local events, facilitate trainings and serve as a spokesperson for the Society. These volunteers are very well-versed in Relay For Life and the American Cancer Society, however, we have never skill-trained them in the areas of facilitation, coaching or public speaking. This problem is the focus of my professional project for graduation from the School of Professional Studies in the Public Service program. As such, the research questions being asked include: What factors have led to the retention of these high-level volunteers? What skill-based trainings have they received throughout their volunteer career with the American Cancer Society? What sentiment do the RAT volunteers have toward receiving spokesperson training? Facilitation training? And coaching training?

SUBJECTS TO BE INCLUDED

- 45.** Describe any inclusion and/or exclusion criteria:

Subjects included are American Cancer Society Midwest Division Relay For Life Advisory Team members

RECRUITMENT AND OBTAINING INFORMED CONSENT

- 46.** Describe your recruitment process in a step-by-step manner:

An e-mail describing the purpose of the survey along with a link to the survey monkey will be sent to all RAT members. After two weeks, a reminder e-mail with the same information will also be sent out.

- 47.** Describe your informed consent process in a step-by-step manner:

The e-mail with the link to the survey will explain the purpose of the survey, what the data will be used for, who will see the data, and explain that there are minimal risks involved and that the survey is voluntary and completely anonymous.

SPECIFIC PROCEDURES TO BE FOLLOWED

- 48.** Describe the methodology to be used and describe in a step-by-step manner the involvement and treatment of human participants in the research, through to the very end of participation. Identify all data to be collected:

A survey on survey monkey will be developed that addresses the above research questions. The link to the survey monkey will be sent along with an e-mail. The survey will be completely anonymous as it does not ask any identifying questions and the survey will not be linked to their IP address. The data will only be accessible by Kari Liotta and the raw data will be shared with the American Cancer Society staff working on the project. I will use the data to inform my professional project and what types of trainings I develop for the Midwest Relay Advisory Team volunteers.

Appendix B:

Office of Research Compliance

Schroeder Complex, 102
P.O. Box 1881
Milwaukee, Wisconsin 53201-1881

P 414.288.7570

F 414.288.6281

W marquette.edu/researchcompliance

November 20, 2012

Ms. Kari Liotta
Professional Studies

Dear Ms. Liotta:

Thank you for submitting your protocol number HR-2505 titled, "*Suggested Trainings for American Cancer Society Midwest Division Relay Advisory Team Members.*" On November 16, 2012, the Marquette University Institutional Review Board granted exempt status for this protocol under Exemption Category #2: Educational Tests, Surveys, Interviews, or Observations.

You may proceed with your research. Your protocol has been granted exempt status as submitted. Any changes to your protocol affecting participant risk must be requested in writing by submitting an IRB Protocol Amendment Form which can be found here: <http://www.marquette.edu/researchcompliance/research/irbforms.shtml>. These changes must be reviewed and approved by the IRB before being initiated, except when necessary to eliminate apparent immediate hazards to the human subjects. If there are any adverse events, please notify the Marquette University IRB immediately.

Please submit an IRB Final Report Form once this research project is complete. Submitting this form allows the Office of Research Compliance to close your file.

If you have any questions or concerns, please do not hesitate to contact me. Thank you for your time and cooperation.

Sincerely,

Benjamin Kennedy
Research Compliance Officer-Human Subjects & Radiation Safetycc: Dr. Christopher Okunseri, IRB Chair
Dr. Eileen Sherman, PRST
Ms. Sherri Lex, Graduate School

AA/rr

Appendix C: Survey Instrument**Survey Questions**

Delivered via Survey Monkey

Age:

Gender:

Years volunteering with the American Cancer Society:

How long have you been a member of the Midwest Relay Advisory Team?:

Why did you begin to volunteer for the American Cancer Society?

Why do you continue to volunteer for the American Cancer Society?

What trainings have you received from the American Cancer Society, if any?

Have you ever received training on being a Spokesperson? Yes/ No (check one)

If so- briefly explain what the training entailed:

Was it helpful in your role on the Midwest Division Relay Advisory team?

If you have not received this training, would you be interested in receiving one? Yes/No (check one)

Why?

Have you ever received training on being a coach to other Relay For Life events?

If so- briefly explain what the training entailed:

Was it helpful in your role on the Midwest Division Relay Advisory team?

If you have not received this training, would you be interested in receiving one? Yes/No (check one)

Why?

Have you ever received training on facilitating trainings?
If so- briefly explain what the training entailed:

Was it helpful in your role on the Midwest Division Relay Advisory team?

If you have not received this training, would you be interested in receiving one? Yes/No (check one)

Why?

Rank which learning methods you prefer- 1 is most preferred, 3 is least preferred method
In Person Meeting
Online E-Learning
Conference Call

How much time would you be willing to commit toward Spokesperson Training: _____ Hour(s)

How much time would you be willing to commit toward Coaching Training: _____ Hour(s)

How much time would you be willing to commit toward Facilitation Training: _____ Hour(s)

Are there any trainings not mentioned that you would be interested in being a part of through the American Cancer Society and Midwest Relay Advisory Team?