Retiree Volunteerism

Grounded Theory – User Research Report

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## Introduction

The goal of our research team is to propose a decision support mechanism for the decisions retirees make when finding and participating in volunteer opportunities. Our research group has interviewed retirees and near-retirees to uncover the processes involved in finding and assimilating into volunteer roles. More specifically, we aimed to discover what motivates them to volunteer, how volunteer opportunities are found, and the extent to which volunteering is a social process and a factor in self-actualization.

### Interviewee Profiles

#### U01

U01 is a single, white female, mid-70s in age, with both a Bachelor’s and Master’s degree in Sociology with concentration on public mental health. She has traveled extensively and held adjunct professor and administrative roles in several small colleges, ranging from Upstate New York, then Colorado, then Tennessee. She then served as Associate Dean of a small liberal arts college in Kentucky and then moved to Florida where she was the administrator and volunteer coordinator for a community mental health facility. She then relocated to Columbia, SC again in administration at a facility for physically and mentally abused youths. She found that role very stressful and then “stumbled upon” a position teaching Sociology at Tri-County Technical College in Pendleton, She has been a volunteer with the Osher Lifelong Learning Institute in Clemson since 2013, initially taking continuing education courses that caught her interest then expanding her role to serve on and later chair the Advisory Board, engaged in institute administration and leadership. Additionally, she has volunteered as a Board member with a local mental health clinic and the Pendleton Historical Society, and with the Anderson School District where she taught basic literacy in an adult education program. She is a frequent user of email and informational websites but not of social media.

U01 enjoyed teaching professionally but always gravitated to administrative and leadership roles related to sociology and public mental health, many which were understaffed and dependent on volunteers. She found an “escape” from the stress of mental health and abused youth clinics in teaching, both professionally at Tri-County Tech and in volunteering.

U01 has never used automated tools to find volunteer roles – she learns of them through her contacts in the related communities and through “word of mouth.”

U01 views volunteering as an “escape,” a way to serve the community, a way to learn and to stay engaged socially. She always tends to start with a small role but if she finds the culture interesting and serves a mission that she admires, she gravitates to administrative roles and Board membership, due to her professional background and her drive to make organizations more effective.

UO1 learned of the Osher Lifelong Learning Institute through “word of mouth” and was attracted by its continuing education mission and the ability to personalize her role there to her schedule and interests.

#### U02

U02 is a 80-year-old military veteran who, after serving and getting married in his 20’s, came back to college to get a bachelor’s, master’s, and PhD in english. He then went on to teach as an instructor at various universities and colleges around South Carolina. While teaching, he would volunteer at various organizations to help students learn to read. Now that he is retired, he spends his time volunteering as a writer, lecturer, and tutor. His primary volunteering role is lecturing at Clemson’s Osher Lifelong Learning Institute. When he’s not volunteering, he sends out weekly quizzes via email to friends, family, volunteers, and students.

He primarily illustrated how personal motivations and interests drive participation in volunteer opportunities. All of his volunteer experience was related to English education, and he frequently cited a sense of satisfaction from leaving a lasting impact on those he helps.

Additionally, he provided fantastic insights about how people learn about volunteer opportunities. He learned about his volunteer experiences through people and places he visits frequently. For example, one time he learned about a volunteer opportunity because a place he frequented had a sign-up board posted. He also frequently received recommendations from friends and group newsletters, like many of our other interviewees, rather than through volunteer matching websites.

Lastly, he gave us insight into how burnout can occur. He talked about how volunteering can be a time commitment, and the more volunteers commit themselves to an organization the more opportunities for volunteering they’re introduced to. Eventually, volunteers reach workload capacity.

#### U03

UO3 is a female Caucasian in her mid-seventies. She was reared overseas; she was born in Pennsylvania but was raised in Argentina and completed her schooling in Spain. She has a BS in English, an MS in Adult Education, and an MBA among other credentials. Ten years ago, she relocated to Clemson to practice her art and be near her family. She has a large family, with 12 grandchildren and 4 daughters. She is a member of numerous organizations, including the Watercolor Society and Anderson Writers Guild. She has sold several paintings and publications. She is a Children's poet as well. She has always volunteered at her children's school and her college since it allows her to make new friends and participate in new activities. She loved to assist others and was quite outgoing. She participated in a variety of activities, such as playing polo in Spain. She organized a group of painters who later turned their efforts into art shows. She has even volunteered to coordinate poker games. She has been a volunteer at a Pickens County equestrian center operated by her daughter involved in teaching children to ride horses and teaching polo. Prior to that she volunteered for the Furman Group, Greenville.

UO3 was a highly outgoing person who always loved to help others. She has always loved volunteering since it has allowed her to socialize and participate in a variety of activities. She claims that participating in charity work has given her a larger base and made her feel more like a person than an elderly woman. She said that volunteering "throws me back into the pond when I help other people swim."

She learned about volunteer opportunities at OLLI by “word of mouth” from within the community rather than finding it using automated tools.

She has discovered hidden talents through volunteering, such as her gift for sales and public speaking, which has helped her go up the corporate ladder, but she is not interested when helping turns into a career. She enjoys getting her retribution by witnessing others receiving the support they require. She looks for opportunities where she may positively impact someone's life.

Despite the fact that she learns about all of her volunteer options by word of mouth, she still wants to learn more about other possibilities, such as working in a national park, and would like to do so by using tools or websites.

#### U04

UO4 is an African American female aged 62. She is a primary school teacher who is set to retire for a second time at the end of this school year. She was born in Little Rock Arkansas. She is divorced and has 4 adult children. She has a BS in Early Childhood education.

She feels volunteering is very important but is unable to engage in it as much as she would like due to her work obligations. Teaching leaves her with very little spare time to volunteer. When she has been able to volunteer, she enjoys the good feelings she gets knowing that she’s helped others.   
 She first did significant volunteer work in her hometown of Little Rock where she volunteered at the local school system, where they needed volunteers to read to students. This led to her becoming a substitute teacher and motivated her to pursue a career in teaching. She feels volunteering led her to become a teacher because she enjoyed seeing the ‘aha’ moment in the kids' eyes when she read to them.

U04 feels that volunteering is necessary to be a good citizen and not giving back speaks to your character as a person.

#### U05

UO5 is an African American male aged 58. He is from a small town outside of Little Rock, Arkansas. He has a bachelor's degree in criminal justice and a law degree. He worked for nearly two decades as a professor teaching paralegal studies. He has come out of retirement multiple times to lend his expertise in jobs that need him. He currently serves as an administrative review officer for the state's Department of Human Services.

U05 feels that volunteering is critical because the government does not have enough resources to help all the people who need help. Without volunteers he feels the efforts to help those in need would be unsustainable. He volunteers on an as needed basis, usually when someone he knows presents him with an opportunity where his talents would be useful.

He has volunteered many years as a mentor for at-risk youth. Judges and sheriffs contact him to be a positive role model for people who are at risk of being consumed by a life of crime. He feels this work is paramount to the stability of the community. He receives joy from seeing the people he works with go on to live happy successful lives as good citizens and has made many lasting connections through this role.

Because his volunteerism is as needed or by request, he doesn’t go looking for volunteer opportunities. At times he’s seen them advertised on the news, He believes that volunteering is where interests meet needs and a large amount of interest is needed to be an effective volunteer. He also advocates for people to volunteer together because “if enough people have come together for the volunteer activity…that volunteer proposition is going to be extraordinarily effective”.

U05 doesn’t have as much time to volunteer due to work obligations but stated that oftentimes when time is not available financial support can be given in lieu of volunteering.

He hasn’t used any technologies to help him find volunteer opportunities but would be open to using an app if ample training was provided. He, like many others his age, has an aversion to technology.

#### U06

UO6 is a Caucasian female aged 54. She oversees a community outreach organization. She holds a bachelor's degree. She has a boyfriend. From an early age, she and her mother and grandmother did voluntary work. . She has been an active participant in numerous volunteer organizations, including Leadership Pendleton and Pendleton United Methodist Church.

According to UO6 Volunteer work is intrinsic to who she is. She is committed to volunteering because she values giving back to the community. She also pushes for her partner to join in on the fun.She frequently organizes charity events, such as art exhibitions, food drives, and other such initiatives. In honor of a young boy who passed away, she was able to raise $200,000 for a playground. Due to her advanced age, she prefers to focus on organizing events rather than engaging in strenuous activity herself.

Her time spent helping others has had a significant impact on her development as a person. She improved her self-confidence, her professionalism, and her ability to handle people. She also takes advantage of the situation to connect with many others who share her interests. This has also aided her professional progress.

She became involved in volunteer work through word of mouth and has never utilized any tools. She usually responds to organizations that contact her via email if she personally knows them. She also has personal interests in volunteer work, such as her wish to participate in Dollywood's volunteer program. She would also like to establish a sea turtle sanctuary.

## Methods

Our team followed the Grounded Theory approach to determine what processes and tools older retired individuals use to find, explore and assimilate themselves into volunteer roles. Grounded theory begins with identification of an appropriate base of research subjects with relevant experience in the area of research interest, crafting an interview process and questions that elicit open conversation about the subject area. recording of the interviews so transcripts of the entire conversation flow can be analyzed in detail. Analysis begins with a meticulous line-by-line visual inspection process that identifies codes, which are the keywords that best define and capture the subjects’ feedback. These detailed codes are then distilled into subject concepts and categories that lead the researchers to development of theories about the research subjects’ motivation and behavior. During the entire process, researchers insert memo notes for documentation of key factors and observations and capture key quotes from the interviewees.

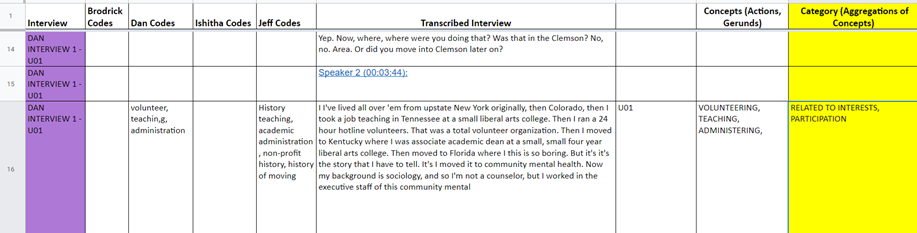
### Identification and recruiting of interview candidates

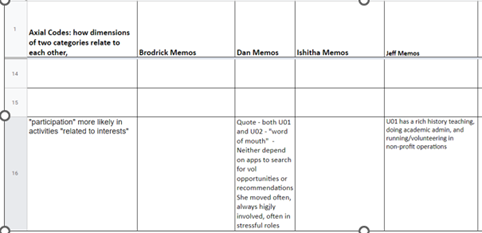
We focused our interview selection on three sources – first with current volunteers of the Osher Lifelong Learning Institute (OLLI) in Clemson and then with residents of the Clemson Downs Retirement Community. OLLI is a nationwide membership-based organization with a mission to provide ongoing education programs and interaction events for enrichment as its members grow older, particularly lecture series, interest groups, and outings. Clemson Downs is a local privately-owned and resident-funded community offering four levels of care for older residents - Independent Living, Assisted Living, Skilled Nursing, and Memory Care. Participants of both organizations tend to be academically oriented due to proximity to Clemson University, so our third source of interviewees were family members of one of our researchers that do not reside in the Clemson area. Through prior research projects and through affiliations with the Clemson University Institute for Engaged Aging, we asked administrators of Clemson Downs to recommend residents who might be interested in our research on retiree volunteerism and for the OLLI executive director to recommend individuals who might agree to be interviewed. For Clemson Downs, the local administrator arranged interviews and for the candidates suggested through OLLI, we contacted them via email, briefly describing our research project and asking them to participate in an hour-long interview, either in-person or via Zoom. All agreed to be interviewed, three in person and three via Zoom. For the two family relatives, both were interviewed via Zoom.

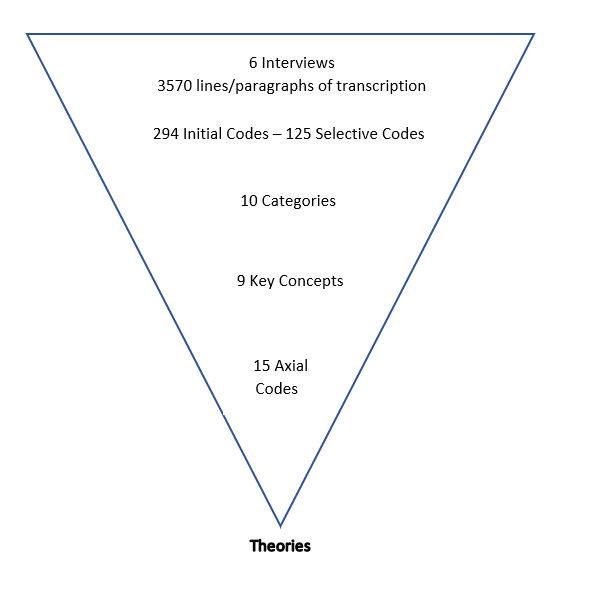
### Interview Protocol and Question List

We conducted our interviews in compliance with the Clemson Institutional Review Board, under an IRB-approved protocol for human-subject protection. Each interviewee reviewed and acknowledged acceptance of the IRB-base consent form and all agreed to having their interview recorded under the privacy protection of the IRB process. We interviewed individual subjects rather than as a couple or group, and in three of our six interviews we had two of us researchers participate. Our interviews semi-structured in that we worked from a common list of proposed questions but rather than being a rigid question-answer forum, we allowed the conversation to flow freely and naturally as the subjects shared their experiences and recommendations over exchanges varying from about 30 minutes up to an hour and 15 minutes but most just under one hour. The questions were arranged from general to specific – first gathering introductory information on the individuals’ education and work background, then addressing the participants’ interest levels and motivations to volunteer, how they found volunteer opportunities, their past and current volunteer activities and how volunteerism can best be promoted and publicized. Our Research Protocol and Questions List document is in the Appendix (A4).

### Grounded Theory Data Collection and Analysis

The audio recordings of each interview were transcribed using the vendor online transcription tool Temi from Use Rev Support Transcription Services. All lines of each transcript were then loaded into a single shared spreadsheet tool with columns for each of our researchers to individually peruse each line of the interviewees’ comments. Adjoining cells for each row of interviewee feedback were then used to derive the code words and to capture our researchers’ memo notes and direct quotes. These were then further analyzed to find the most common indicative codes, concepts and concepts from the initial codes in each documented line of feedback. This analysis then was used to derive the theories explained in the next session on how retired people learn about volunteer opportunities, decide on which if any they want to pursue, then assimilate into a role that they personalize to their interest and availability and then in many cases encourage others in their community to volunteer likewise. Below is a brief excerpt from our Grounded Theory collection and analysis repository tool (left-side and right-side of same rows) and more detail is shared in the Appendix. The full version of our repository is available on request:



**Grounded theory process :** 

See Results section below for explanation of Categories, Concepts and Axial Codes and with the specific values of these elements of our research in the Appendix (A1).

Our analysis also reflects many Vivo Quotes relevant to our research (see A3)

## Results

Through grounded theory we aimed to reach a theory of participation in volunteer activities. We found a number of influences on participation that guided our general theory of participation. Our findings revealed a predominant influence of personal factors, such as personal motivations and interests, interpersonal relationships, and feasibility of participating when volunteers find and recommend volunteer opportunities to others. Our findings highlight the importance of personalized experiences (e.g., concordance with interests, enabling deeper interpersonal connections, enabling autonomy) when volunteers find and recommend volunteer opportunities.

Our coding process resulted in numerous codes, which are available in the appendix (A1, A2). Our coding process revealed 9 core concepts - v*olunteering, teaching, learning, connecting, escaping, staying relevant, contributing, personalizing experience/self-actualization, socializing & community, and commitment*. There were many variations of these concepts, but most can be boiled down into those nine concepts. Many of our volunteers were dedicated teachers and volunteers devoted to their missions, while others used volunteering as more of a social outlet. These concepts helped capture the diversity in volunteer preferences.

These concepts were then boiled down into 10 categories, which can be grouped into two main groups related to *participation*, or the extent to which a volunteer participates in volunteer opportunities. The first group consists of categories related to opportunity-volunteer fit, that is, how good of a fit is the opportunity for the volunteer? This group was composes of the categories *related to interests*, which captures the degree to which an opportunity relates to an individual’s historical or current interests; *personal motivations*, which describes one’s particular motivation for volunteering, whether it be to have an impact, socialize, stay engaged while aging, or escaping; *organization culture*, which is concerned with the culture and make-up of an organization, both in terms of the individuals; *commitment requirements*, which describes how much of a time or energy commitment an opportunity is; and *feasibility,* which describes one’s ability to participate in volunteer opportunities, particularly in relation to accessibility considerations such as distance, age-related mobility, finances. The second grouping of categories is related to finding and sharing information about new opportunities, such as *organic snowballing,* which is an organic domino effect where going to events related to your interests, volunteer-sponsored activities, and volunteering exposes individuals to opportunities to volunteer, typically through word-of-mouth or interpersonal relationships; *recruitment efforts*, or efforts to recruit others into volunteering, whether it be through word-of-mouth, flyers, websites, etc.; and lastly, *information accessibility*, or the extent to which information about volunteer opportunities is accessible to older adults, such as the choice of technology used to disseminate information about opportunities to retirees. These two groupings of categories provide a strong basis for understanding how people find volunteering opportunities–the volunteer opportunity has to be a good fit, and information about the opportunity has to actually reach the potential volunteer. We developed several axial codes out of these categories, which are listed in the appendix below (A2). However, the major takeaways from the axial coding process follows.

### Importance of Interests and Motivation

The first major finding was that participation is driven organically through personal motivations and interests. That is, the more a volunteering opportunity aligns with one’s interests or personal motivations, the more likely they are to volunteer. For example, UO3 used to play polo and now teaches young children how to ride horses and play polo, saying “I'm open ….. Just ask!”. UO3 is also a talented artist who volunteers at grade schools to provide art presentations and encourages others to pursue the arts, saying “ I guess I've used volunteering as more of an escape” and “to give bac.” Another interviewee, UO2, spent his career as an English teacher, and now volunteers to teach students how to read and leads lectures about English at OLLI, saying “Well, I've been a teacher for 42 years, and they were offering me the opportunity to continue doing what I always loved”. and “ It's been very important. It's changed my life. It's kept my brain alive.” U05 stated that “...any good volunteer…or effective volunteer, is going to select volunteer opportunities in which that volunteer has a deep interest”. For him, volunteering is where interests meet needs.

### Volunteering Leads to more Volunteering

Our next major finding was that just by participating at opportunities, even in a non-volunteering capacity, interest in volunteering was organically cultivated and would frequently result in finding new volunteer opportunities. For example, UO1 and UO2 noted that they initially learned about volunteering opportunities by participating in classes at OLLI; however, people approached them about volunteering opportunities and they decided to participate. Now that they are regular volunteers at the organization, they learn about new volunteering opportunities all the time, saying “Yeah. Well, work expands for the time you have!” . Essentially, once you’re in the loop, you don’t need help finding opportunities because they happen organically. In extreme cases, volunteering can open up entire career opportunities. For example, volunteering not only helped UO3 overcome her fear of public speaking, but it also revealed her talent for sales, which has given her jobs in the sales world. Additionally, through volunteering UO6 was able to get job references which has led to new careers. Some volunteering organizations have taken to capitalizing on the snowballing, where volunteers may actively seek new volunteer recruits at organization-sponsored events. For example, UO1 noted that at organization-sponsored events, she is always there “making a plea” for new volunteers. And many of our interviewees remember being approached in-person, directly by the organization, as the way they were given various opportunities within an organization. Regardless, as many of our interviewees have said, “word of mouth is the key” to recruiting volunteers and finding opportunities yourself. As U01 said “I have no idea of anybody who finds volunteer jobs via computers. Okay. I don't know a person, not one. The way you find volunteers is through other people, word of mouth.”

### Organizational Culture Role Volunteer Efforts

Interestingly, organizational culture was a major factor in volunteer’s decision to participate in volunteer opportunities. For some, it’s the factor that brings them into the organization. For example, UO1 noted that sometimes she brings friends to see OLLI, since they are curious; and when she does–and they get to meet the organizers, the volunteers, and are exposed to the general culture–“they are sold!” The organizational culture is affected by many things, as industrial-organizational psychology can point you to. But relevant to our project is the influence of individuals on the organization culture. Some volunteers make major contributions to the organization culture, and they often draw in many members and potential recruits. For example, UO1 noted many volunteers with notable careers, such as a doctor who fought HIV, highly distinguished academics, and people who worked at fortune 500 companies. She noted how they deliver particularly interesting lectures, which draw in a crowd of people who may eventually also participate. Notably, while recruitment efforts help boost volunteering numbers on their own, they can also improve the organizational culture. For example, the doctor that U01 mentioned decided to start an annual recruitment effort where they served wine and cheese. This event attracts a large crowd and is an overall positive to the organizational culture.

### Required Commitment of Volunteering

Another major factor that affects participation at volunteering opportunities is the level of commitment required, and the feasibility of actually attending. How much time, energy, and overall commitment required for an individual to participate in an opportunity has a great impact on their ability to participate. For example, as UO1, UO2, and UO3 noted, retirees lead very busy lives–many have families that live all over, are involved with organizations around them, or are doing other activities with their retirement time–so regular time commitments can be difficult for some. Another example is that some volunteers may experience age-related issues that reduce the feasibility of participating, like arthritic volunteers as UO2 noted. Some retirees often return to work in some capacity but still want to volunteer. U04 and U05 both expressed that they would do more volunteering if their work didn’t take up so much of their time. On the other hand, some people have personal motivations that may affect their desire to commit themselves to volunteering opportunities. For instance, U01 reported a strong sense of commitment to causes that help children, so she started a center for helping abused childrens, created a high-stress, high-commitment role for herself motivated entirely by her commitment to her mission. On the other hand, if the commitment required by an opportunity exceeds one’s threshold, they may seek volunteering opportunities that better fit their motivations and feasibility. For example, sometimes UO3's volunteer work felt more like a job than something she was passionate about, and she often left feeling dissatisfied. And in some cases, like UO1 & UO2 noted, people “get up to here” with responsibilities and just say “I’ve done enough,” ultimately quitting their volunteering role.

### Volunteer Recruitment

Moving away from the influence of the volunteer, volunteer organizations often make recruitment efforts, much like many other organizations. These have varying degrees of success, which largely hinges on how accessible the information is. This is mainly because older adults have technology and information consumption habits that differ from most. Many of our volunteers cited rather low-tech technology usage, relying on email and word-of-mouth for communication more than social media or other websites. For instance, UO3 and her friends learned about volunteer possibilities mostly by word of mouth, and she suggested that many in her age group don't use online resources when looking for opportunities. UO1 cited specific concerns about misinformation as a reason for avoiding social media, and stated that she’s trying to avoid “getting hooked” to email. So, it’s important to consider the information consumption habits of retirees when designing a system that will deliver them information. Notably, some recruitment efforts are trying to improve information accessibility. For example, according to UO1, OLLI is making efforts to archive many of its lecture series and provide more information for potential volunteers on their website and email newsletters, that way individuals can more readily find information. OLLI has also made efforts to get people to congregate, such as socials and book exchanges. A key finding was that often finding volunteer opportunities is not a case of retirees **outside an organization looking in**, but rather current volunteers and staff **inside an organization looking outward** to attract new volunteers.

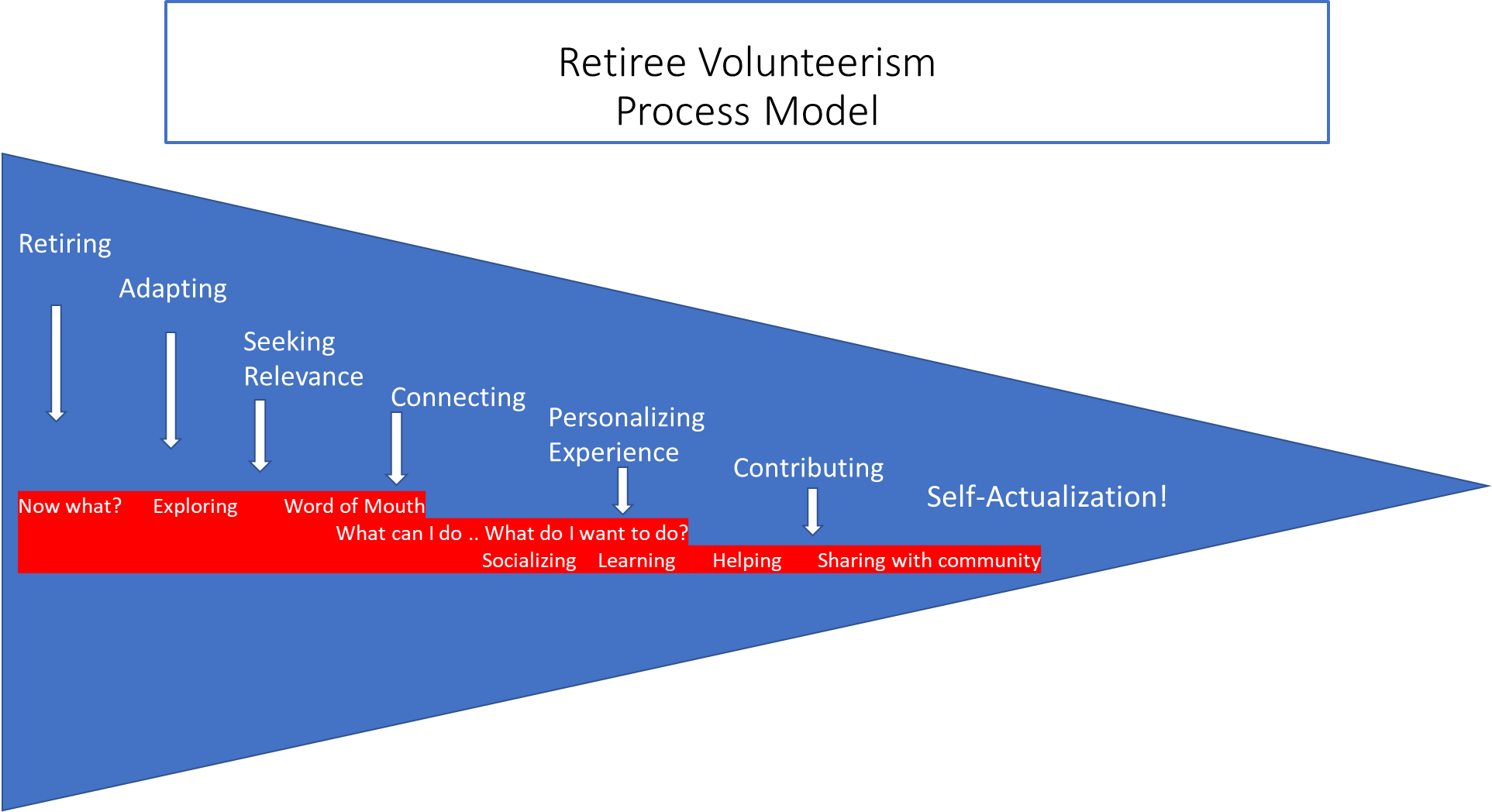
### Volunteer Habits Change Over Time

Lastly, the motivations, interests, and abilities of volunteers change as time goes on, especially with aging retiree volunteers, which affects their desire and ability to participate. For example, UO6 participated in a horse welfare camp; however, this was a high energy commitment activity and she felt she was getting too old, so she terminated participation with them. Additionally, personal motivations may change, and volunteers may decide they want to try something different. For example, UO3 stated that she would like to explore new volunteering opportunities and that she has always wished to work for the National Parks and assist them in utilizing her skills. UO6 said if there is a chance she would like to volunteer for Dollywood and also would like to take care of sea turtles. It is in their best interest that organizations accommodate these changes in motivations and abilities. Oftentimes, allowing people to take charge leads to them leaving a greater impact on an organization than might have otherwise been possible. For example, UO1 mentioned a doctor who had fought HIV was being onboarded to OLLI. OLLI had made informal plans to get him to lecture about COVID-19 at the time. However, instead of lecturing in his area of interest, he actually wanted to help fundraise. So, he started a variety of fundraising efforts and did so successfully, starting the annual “wine-and-cheese” recruitment and fundraising event that draws in large crowds.

### General Theory

This leads us to our general theory, which is that finding and committing to a volunteer opportunity is a deeply personal process. Usually information about opportunities is spread through interpersonal relationships and communications. Additionally, volunteering opportunities must be a good fit for the volunteer. For instance, they must be related to their interest, fulfill their goals, and be accessible to them, in effect, contributing to their self-actualization as theorized by Maslow and others. And when they actually go to volunteer, the opportunities must remain a good fit for the volunteer, even as the volunteer’s motivations, interests, and abilities change. From finding opportunities, to participating, to staying devoted to an organization, every step in the volunteering process is deeply personal for the retired volunteers. So, a decision support mechanism must support this highly personal process where retiree volunteers are in their lives, rather than try and replace it with an interface that will be abandoned. Attempts to replace the process entirely have failed, as seen by the low prevalence of website-based recommendation systems being used by retirees.

Our Process Model is below:



## Appendix

### A1 - Frequency Count of Codes

| **Code Word** | **Code Frequency** |
| --- | --- |
| volunteering | 26 |
| word of mouth | 15 |
| connecting | 14 |
| teaching | 9 |
| personalizing experience | 8 |
| education | 8 |
| friendship | 8 |
| commitment | 7 |
| socializing | 6 |
| emailing | 6 |
| communicating | 6 |
| interesting | 6 |
| recommending | 5 |
| website | 5 |
| community | 4 |
| administration | 4 |
| academic | 4 |
| volunteer | 4 |
| mission | 3 |
| scholarships | 3 |
| experiences | 3 |
| art | 3 |
| fun | 3 |
| involvement | 3 |
| publicizing | 3 |
| motivation | 3 |
| family | 3 |
| fundraising | 3 |
| helping | 3 |
| tasks | 2 |
| age | 2 |
| time | 2 |
| preferences | 2 |
| volunteers | 2 |
| advisory | 2 |
| marketing | 2 |
| communication | 2 |
| culture | 2 |
| retired | 2 |
| not aware of websites | 2 |
| asking friends | 2 |
| goals | 2 |
| attracted | 2 |
| learning | 2 |
| sweet spot | 1 |
| crafts | 1 |
| overload | 1 |
| burnout | 1 |
| rewarding | 1 |
| fulfilling | 1 |
| feeling alive | 1 |
| challenge | 1 |
| covid | 1 |
| children | 1 |
| digital aversion | 1 |
| Giving back | 1 |
| sharing | 1 |
| classes | 1 |
| brain alive | 1 |
| gratification | 1 |
| website out of date | 1 |
| hate social media | 1 |
| partnering | 1 |
| collaboration | 1 |
| playing | 1 |
| in the loop | 1 |
| rarely use website | 1 |
| aging out | 1 |
| remote volunteering | 1 |
| asking wife | 1 |
| bonding | 1 |
| keeping up | 1 |
| encouraging | 1 |
| kids |  |
| expanding | 1 |
| learning | 1 |
| variety | 1 |
| wine | 1 |
| free | 1 |
| welcoming | 1 |
| atmosphere | 1 |
| participate not control | 1 |
| love social media | 1 |
| people | 1 |
| maintaining knowledge | 1 |
| physical limitations | 1 |
| making a difference | 1 |
| pleasure | 1 |
| afraid | 1 |
| awareness | 1 |
| mattering | 1 |
| recommendation | 1 |
| meeting people | 1 |
| recruiting | 1 |
| memory | 1 |
| barriers | 1 |
| mental wellbeing | 1 |
| satisfaction | 1 |
| mentoring | 1 |
| serendipity | 1 |
| confidence | 1 |
| snowballed | 1 |
| mobility | 1 |
| success | 1 |
| autonomy | 1 |
| escape | 1 |
| never search websites | 1 |
| tech resistance | 1 |
| no technology | 1 |
| time commitment | 1 |
| connecting | 1 |
| bringing friends | 1 |
| not tech savvy | 1 |
| feeling like a person | 1 |
| online tools not useful | 1 |
| freedom | 1 |
| opportunities | 1 |
| website searching | 1 |
| outgoing | 1 |
| friend recommended | 1 |
| outreach | 1 |
| youth | 1 |
| life-changing | 1 |
| like-minded people | 1 |
| Sum | 287 |

### A2 - Categories, Concepts and Axial Codes

| **Categories** |
| --- |
| Volunteering |
| Teaching / Learning |
| Connecting |
| Escaping |
| Staying Relevant |
| Contributing |
| Personalizing Experience / Self Actualization |
| Socializing |
| Community |
| Commitment |
|  |
| **Concepts and Groupings** |
| **Opportunity-volunteer fit** |
| Related to interests |
| Personal motivations |
| Organization culture |
| Commitment requirements |
| Feasibility |
|  |
| **Finding & sharing new opportunities** |
| Organic snowballing |
| Recruitment efforts |
| Info Accessibility |
|  |
| **Participation outcomes** |
| Participation |
|  |
| Personalizing experience |
|  |
| **Axial codes** |
| **Participation driven organically through personal motivations and interests** |
| "participation" more likely in activities "related to interests" |
| "participation" more likely in activities that fulfill "personal motivations" |
|  |
|  |
| **Organizational culture is an attribute that volunteers care about** |
| "organization culture" can be a determining factor for "participation" |
| Some member's "participation" contributes greatly to the "organization culture" |
| Some "recruitment efforts" can improve the "organization culture" |
|  |
| **The commitment the opportunity requires and feasibility to volunteers may attract or repel people** |
| "commitment requirements" and "feasibility" can influence the amount of "participation" |
| some people have "personal motivations" which drive them to "participation" in opportunities of varying "commitment requirements" |
| some people have "personal motivations" which drive them to "participation" in opportunities with varying "feasibility" |
| high "commitment requirements" or low "feasibility" may lead the volunteer to seek "participation" in other activities related to "personal motivations" |
|  |
| **Recruitment efforts must consider how accessible their efforts are** |
| Older adults have "information accessibility" concerns which may affect "participation" |
| Some "recruitment efforts" try to improve "information accessibility" |
|  |
| **By participating, you are exposed to even more opportunities which results in snowballing** |
| "organic snowballing" is often how people initially start "participation" |
| "participating" in activities "related to interests" leads to more (or initial) "organic snowballing," leading to more opportunities for "participation" |
| Some "recruitment efforts" capitalize on "organic snowballing" |
|  |
| **Sometimes goals and abilities for volunteering change; organizations should accommodate this dynamism** |
| Sometimes "feasibility" changes, affecting "participation" |
| Sometimes "personal motivations" change, affecting "participation" |

### A3 - Quote Bank

| **Quote Bank** | **Category or Concept Link** |
| --- | --- |
| People wanna volunteer. They want to be, I'll come, I'll do whatever you want me to do for two hours next Thursday, but don't ask me to come on Tuesday. Don't ask me to come on Friday. Okay. That's good. You now, people who, who typically are here, have very busy lives | Commitment requirements |
| . The word of mouth is, I mean, I'm shocked at how, you know, many people I've said, they'll say, Oh, what, what's this o you keep talking about you do this Holly? And I said, Well what, you gotta come on over. Let me let, let me show you the, the class. Let me show you the building. Let me introduce you to the worker. | Connecting, Word of Mouth |
| She has all this connected connections. | Connecting, Word of Mouth |
| so for me, my connection, my social connection is through email. | Emailing |
| . So I I'm always forwarding stuff from idealist.com to somebody | Emailing |
| Email is wonderful. These daily quizzes that I send around and weekly quizzes, they're a lot of fun. I really enjoy that. Yeah. And Google, I must use Google 20 or 30 times a day | Emailing |
| 0, I guess it was early 2020 when everything was shutting down. Yeah. People going on quarantine. And so I started a a daily puzzler that I do online. | Emailing |
| I write probably a monthly, sometimes it comes out weekly, but it's called Weekly Hubris It's an online magazine, and I write a little essay for them. | Emailing |
| I don't remember how I first even learned about O Yeah. I know it wasn't, I must have read about it someplace | Finding Opportunities |
| I have no idea of anybody who finds volunteer jobs via computers. Okay. I don't know person, not one. The way you find volunteers is through other people word of mouth | Finding opportunities |
| . It was just simply a matter of, you know, catching my eye. | Finding Opportunities |
| I'm not looking for anymore. Yeah. But I, I would imagine it works very well for, for a lot of people. Okay. And I would recommend them to people looking for things. But I've never gone to the computer to Google to see where else I could volunteer. | Finding Opportunities, Websites |
| Learned of volunteer opportunity through "word of mouth" | Finding Opportunities, Word of Mouth |
| he way you find volunteers is through other people word about, so you, or not only word of mouths from strangers | Finding Opportunities, Word of Mouth |
| No, I, I've, I wasn't aware that there was that tool. | Finding Opportunities, Websites |
| a general sense of wellbeing. A sense that I matter that, that if, if I care for this….. and I enjoy their company. Mm-Hmm. <Affirmative> has been very fulfilling. | Fulfillment, Giving Back |
| or me, the, the motivation is the mission of the organization. And so I wouldn't volunteer with an organization that I didn't feel committed to the mission | Motivating, Mission |
| Well, I've been a teacher for 42 years, and they were offering me the opportunity to continue doing what I always loved | Motivation |
| Volunteered to be a reading tutor at Clemson Elementary, but that was very rewarding. | Personal Motivation |
| type of volunteering there makes people expand. It brings 'em out of themselves | Personal Motivation |
| Wanted to do something totally different. Yeah. That's not in the job description, | Personalizing Experience |
| So that makes it more attractive. They have some freedom | Personalizing Experience |
| it would be like, been there, done that, <laugh> | Personalizing Experience |
| don't want to be available to everybody. | Personalizing Experience |
| That <laugh> he wanted to do what he wanted to…... So more interested in fundraising than his own like, personal field. | Personalizing Experience |
| , I've been there and as I say, I've run organization where I had to beg for dollar. I'm not gonna do that anymore. | Personalizing Experience |
| . Something with no responsibility | Personalizing Experience |
| Something that says, I can come in, I can take it, but I'm not the boss of it. | Personalizing Experience |
| No interest in that at all (Administration) … but got on two boards after I retired. The see, what was it? Emeritus College Board and the recreation Clemson Central Recreation. | Personalizing Experience |
| That It was the board of the Emeritus College that turned me off more than anything..., it was awful.. Had to resign | Personalizing Experience |
| she doesn't want to teach, although she's done that in the past, she wants to administer. That's fine. And you don't want to administer, you want to teach | Personalizing Experience |
| Wouldn't work for me cuz I can usually find my own. | Personalizing Experience |
| The other issue we have is that folks age out….we had one fella who his spouse died and physically he just, Yeah. You know, | Physical Limitations |
| English is her second language, and so she's a little reluctant to get in some of these | Physical Limitations |
| A lot of 'em are just physically unable to Yeah. I mean, they have the computer and they have the knowhow, but you know, they're arthritic and just can't, can't do it anymore | Physical Limitations |
| once I found out that there was other needs, then, then I progressed | Snowballing |
| So you utilize 'em too much. I think that's, I think that's one of the negative things I've found | Snowballing |
| Yeah. Well work expands for the time you have <laugh>. | Snowballing |
| Yeah. We have been serving wine <laugh> | Socializing |
| It's been very important. It's changed my life. It's kept my brain alive | Staying Relevant |
| I wouldn't do Snapchat if my life depended. I have no interest in it…. I have no desire to do any of that nonsense. And, you know, the amount of, of misinformation and, and that's being spread. | Technology, Social Media |
| Most of our folks do email. Yeah. And a lot of them are in Facebook. That's a, that's a big thing cuz they see their grandkids and on and on | Technology, Social Media |
| e got way behind with Covid and we had to go literally teaching Zoom and nobody taught Zoom and nobody knew Zoom was, And then we had to teach our instructors to use Zoom. | Technology, Social Media |
| I'm open ….. Just ask! | Volunteering |
| Two paid employees for 1,450 volunteers. Yeah. Is crazy. (OLLI) | Volunteering |
| hundreds of volunteers, but they may volunteer. I mean, they may volunteer for one thing a year. | Volunteering |
| The sweet spot for us is about, well we always say a woman, a white woman with a master's degree, age 70 to 75. | Volunteering |
| Well, I don't know any younger volunteers <laugh>, so I can't speak | Volunteering |
| so I guess I've used volunteering as more of an escape | Volunteering. Escaping |
| Interesting. So it sounds like the website might be useful for people that are outside of the loop, whereas once you're in the loop, you know what's going on, you don't really need | Websites |
| XXXX who was a good friend of mine and she said, I think he would enjoy teaching at o. And so I had never even, I didn't even know…. Yeah, Word of mouth. | Word of Mouth |
| she just came up to me at one after one meeting and said, you know, I think you'd be interested in | Word of Mouth |
| Well, I mentioned John and before he moved up to Hillsborough, North Carolina, I tried to get 'em involved here, but I guess he knew he was, he was moving pretty soon. So he went up there and he did end up teaching in the Duke OLLI program | Word of Mouth |
| . So again, it's familiarity. Word of mouth (Board of Clemson Recreation Dept) | Word of Mouth |
| That was word of mouth. | Word of Mouth |

### A4 - Interview Protocol and Questions:

|  | **HCC 8810 - Group 4 - Volunteerism - Interview Protocol** |
| --- | --- |
| **Introduce Ourselves** | Names/background/student status |
| **Interview Approach:** | The interviews in our research are “semi-structured” meaning that the interviewer introduces the topic, and then the interviewee leads the conversation on this topic. Where useful, the interviewer may follow up on things the interviewee says or may guide the conversation back on topic if the interviewee goes on tangents not relative to the research objectives. |
|  |  |
| **Interviewee Affiliation or role :** |  |
| **Interviewee (Title and Name):** |  |
| **Mode/Location of Interview:** |  |
|  |  |
| **Permission to record:** | To facilitate our note-taking, we would like to record our conversations today. Please review the **release form**. For your information, only researchers on the project will have access to the recordings which will be eventually destroyed after they are transcribed. |
| **Human subject protection:** | We asked you sign a form devised to meet our human subject requirements. Essentially, this document states that: (1) all information will be held confidential, (2) your participation is voluntary and you may stop at any time if you feel uncomfortable, and (3) we do not intend to disrupt or negatively impact any processes. Thank you for your agreeing to participate. |
| **Time commitment:** | We have planned this interview to last no longer than one hour. During this time, we have several questions that we would like to cover. If time begins to run short, it may be necessary to interrupt you in order to push ahead and complete this line of questioning. |
| **Why them?:** | The purpose of this research is to learn about the volunteering experiences of older adults, and about what goes into choosing among many available volunteering  opportunities. You have been selected to speak with us today because you feel you can help us understand the procedures, motivation, issues and areas for improvement in finding volunteer opportunities. Participants get to contribute to a research study that students conduct for their class. This research will support the development of new decision-support systems for older adults to help them choose volunteering opportunities |
|  |  |
|  | **Suggested Interview Questions - Do not use as a script but as conversation starters, to keep discourse moving, and for wrapup to ensure completeness** |
|  |  |
|  |  |
| **General / Opening** | Ask interviewee to introduce themselves - either actively or passively collect demographic data - approximate age, gender, race, hometown, education, employment, interests, health status |
|  |  |
|  |  |
| **Active Volunteers** | How important is it to you personally to volunteer? |
|  |  |
|  | What feelings do you get volunteering? Suggest Satisfaction...... Staying Involved? Giving Back? Friendship? Frustration? |
|  |  |
|  | Where have you volunteered in the past? Has a volunteer role ever turned into a job for you? |
|  |  |
|  | Whare are you volunteering now? How many different organizations do you volunteer for? |
|  |  |
|  | How long have you been volunteering? How long have you been a volunteer at Osher LifeLong Learning XXXXXX ? |
|  |  |
|  | What features of those organizations do you like? |
|  |  |
|  | How much time per week or month do you want to spend volunteering? |
|  |  |
|  | Once you select a volunteer opportunity, what roles do you like to take on? |
|  |  |
|  | What's your favorite aspect of volunteering? |
|  |  |
|  | Do you frequently volunteer with the same individuals? Have you made any friends volunteering? |
|  |  |
|  | Have you ever volunteered somewhere then decided "this is not for me" - Why? |
|  |  |
|  | What factors would make you quit volunteering at an organization? |
|  |  |
|  | How did you learn of those volunteering opportunities? |
|  |  |
|  | Do friends recommend volunteering opportunities and why? |
|  |  |
|  | Do you ever recommend places to volunteer to others? What motivates you to do that? |
|  |  |
|  | Do you ever get mail or emails asking you to volunteer? How do you react to those? Were they legit? |
|  |  |
|  | What do/did you look for when trying to find a volunteering opportunity? |
|  |  |
|  | Do you prefer to volunteer with your spouse? Or with friends? Or alone? Why? |
|  |  |
|  | What does an organization need to do and be like to attract you as volunteer? |
|  |  |
|  | Are there any pain points during the volunteer process? |
|  |  |
|  | Tell us about your most positive volunteering experiences |
|  |  |
|  | Tell us about your most negative volunteering experiences |
|  |  |
|  | Have you ever used any systems or websites to find volunteer opportunities? |
|  |  |
|  | <https://www.volunteermatch.org/> |
| **Team: are these good options?** |  |
| **Suggest others and use best 2 or 3** | [Specific to Clemson: Note OLLI is at top of list https://www.volunteermatch.org/search/orgs.jsp?aff=&includeOnGoing=true&r=20.0&l=102+Fort+Hill+Street+%28Mailing+520+Fort+Hill+Street+%28Location%2C+Clemson%2C+SC+29634%2C+USA](https://www.volunteermatch.org/search/orgs.jsp?aff=&includeOnGoing=true&r=20.0&l=102+Fort+Hill+Street+%28Mailing+520+Fort+Hill+Street+%28Location%2C+Clemson%2C+SC+29634%2C+USA) |
| **that we can best improve** | <https://www.volunteermatch.org/search/orgs.jsp?aff=&includeOnGoing=true&r=20.0&l=102+Fort+Hill+Street+%28Mailing+520+Fort+Hill+Street+%28Location%2C+Clemson%2C+SC+29634%2C+USA> |
|  |  |
|  | <https://www.greenville.com/directory/bd-categories/volunteer-ops/> |
| **A good improvement may be to permit organization to post videos showing their volunteers in action - or people describing the organization** |  |
|  | <https://www.dosomething.org/us/articles/volunteering-opportunities-in-your-community> |
|  |  |
|  | <https://www.aarp.org/volunteer/> |
|  |  |
|  | For each site you used, how was that experience? (BRING UP THE SITE AND VIEW TOGETHER - IF NONE OR THESE NOT MENTIONED REVIEW THEM: |
|  |  |
|  | What features did you like? |
|  |  |
|  | What feature did you not like? |
|  |  |
|  | Describe what features the perfect volunteer search application should contain |
|  |  |
|  | How useful would it be if he volunteer search application contained still images of their volunteers in action? |
|  |  |
|  | How useful would it be if he volunteer search application contained video clips of their volunteers in action? |
|  |  |
|  | How useful would it be if he volunteer search application contained video clips of the spokesperson of the organization describing thier mission and needs? |
|  |  |
|  | How useful would it be if he volunteer search application contained video clips of current volunteers of the organization describing their experiences? |
|  |  |
|  | Is there anything else you want to share with us about Volunteering? |
|  |  |
|  | **THANK THEM!** |
| For each interviewee (collect by observation if it is not comfortable to ask:) | Age range |
|  | Gender |
|  | Race |
|  | Education level |
|  | Nationality |
|  | Marital status |
|  | Employment |