McGill Institute for Learning in Retirement: A Case Study of Change in a Volunteer-led Organization

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Dedicated to my daughters Kate and Patricia

Abstract

The case study examines the process of change undergone by the McGill Institute for Learning in Retirement (McGill ILR), a volunteer-led organization. ILRs have emerged across North America in the past 15 years and their success is attributed to the congenial participatory learning environment and the fact that members volunteer to administer the program activities in collaboration with a host university.

Four years after it was founded, leaders sensed the need to evaluate McGill ILR's strengths and weaknesses. Under the aegis of McGill Centre for Continuing Education, a Planning Committee designed and implemented an organizational self-assessment to provide recommendations for change and ensure sustainability.

The study revealed: (a) that this community of older adults taught themselves how to respond to change effectively and (b) that the overarching characteristics of an ILR, together with a spirit of dialogue, provided an organizational structure which helped volunteers absorb change.

Résumé

Cette étude de cas analyse le processus de changement survenu au sein d'un organisme de bénévoles, l'Institut d'études à la retraite de McGill (IERM). Les instituts d'études à la retraite ont essaimé dans toute l'Amérique du Nord au cours des 15 dernières années; leur succès est attribuable au cadre d'apprentissage convivial qu'ils offrent et au fait que les membres administrent bénévolement les activités au programme, en collaboration avec l'université hôte.

Quatre ans après la fondation de l'organisme, les dirigeants ont éprouvé le besoin d'en évaluer les atouts et les faiblesses. Sous l'égide du Centre d'éducation permanente de l'Université McGill, un comité de planification a conçu et mis en oeuvre une auto-évaluation organisationnelle pour proposer des changements et assurer la viabilité de l'organisme.

L'étude démontre que: a) ce groupe de personnes âgées s'est de lui-même fort bien adapté au changement; b) les caractéristiques intrinsèques de l'IER et l'esprit de dialogue ont fourni le cadre organisationnel qui a permis cette adaptation.

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McGill Institute for Learning in Retirement: A Case Study of Change in a Volunteer-led Organization

Table of Contents

Chapter 4 The Process of Organizational Change

Chapter 5 Concluding Discussion

Appendices

References

List of Tables and Figures

Chapter One
Introduction: Volunteers, Organizations and Change

1.1 Rationale

There have been dramatic increases in the number of older people who volunteer-- from 11 per cent in 1965 to more than 40 per cent in 1990 (Fischer & Banister Schaffer, 1993). Still, the importance of volunteering is often under-recognized and under-valued in our society. Organizational life has lost touch with the role volunteers play in the community life we all enjoy and volunteer-run programs often suffer from the "benign neglect" of managers and executive boards as they focus on profit-generating activities (Graff, 1993). Nonetheless, community organizations that rely upon volunteers continue to grow to satisfy the needs of specific populations.

Demographics indicate our population is aging rapidly. At the same time, social and technological changes are occurring rapidly. In the United States projections are that there will be 35.3 million people over 65 in 2000 and over 70 million in 2030 (Young, 1996/7). Volunteer non-profit organizations do not have the human nor financial resources to study the effects of these changes-- their unpaid or underpaid workers are busy enough maintaining everyday activities without increasing the workload with a research project.

For good reason, leaders of these organizations are cautious about introducing change. First, there is the question of whether the

volunteers are capable and available to complete the project. Second, organizations need access to additional resources to implement change without overtaxing volunteer goodwill. The rationale for this study comes from the recognition of a need to better understand change in volunteer cultures.

My experience in the administration of small volunteer organizations began when I was director of programming for the Festival international de films et vidéos de femmes from 1984-1989. Managing an arts organization run by women who were underpaid taught me that survival meant balancing collective feminist values with insecure funding. Our struggles to be self-sustaining consumed most of our time and energy.

I was struck by the commonalities between an arts organization and an institute for learning in retirement. Both organizations offered popular adult education programs; both provided a milieu for people to come together to discuss social, political and cultural issues; both were non-profit; both were self-governing and believed in a non-hierarchical collective form of management. The major difference was that the McGill ILR was self-financing through membership fees-- something the women's film festival had never been able to achieve; it relied heavily on government subsidies.

1.2 Problem Statement

This study addresses several problems that concern volunteer

organizations. First, volunteer organizations are valuable components of our society, yet their governance and their strategies for survival are not widely known. There is a need to know more about the behaviour and activities of volunteer organizations and how they respond to change. Second, as volunteer organizations grow, they increase capacity incrementally. Yet if growth happens too quickly and the organization overextends its capacity, crucial problems arise. Third, these circumstances demand frequent consultations between volunteer-members and volunteer-leaders to determine the best procedures. However, communication is challenging as volunteers only attend part-time. Volunteers who are leaders need practical tools to communicate change to other volunteers.

Too frequent changes in organizational operations and leadership affect volunteers' attitudes and commitments (Fisher & Cole, 1993) and rupture their faith in the organization's continuity. If internal politics are perceived as shaky and external politics are in upheaval, the combined effect is one of volunteer uncertainty and lack of faith (Pearce,1993). Volunteers are often resistant to interventions from professionals and do not like to become involved in bureaucratic management procedures which compare their work alongside paid staff (Fischer, L., 1993; Fisher & Cole, 1993). They prefer informal working environments.

There are no salaries and hence no detailed records are kept of hours worked. Most volunteer organizations do not allocate equivalent monetary value for volunteer time in their budgets

(Schlindler-Rainman, 1980). The atmosphere is therefore different from organizations where job distinctions and salaries create a hierarchical structure. In the case studies conducted by Pearce (1993) these quasi egalitarian workplaces created uncertainty in various areas of responsibility:

> *Despite the attractiveness of these egalitarian workplace structures, they occasionally contributed to uncertainty in organizational responsibility in several sampled organizations. This can lead to the 'chaotic' character of many organizations that are staffed and run by volunteers (Pearce, p.10/11).*

A volunteer organization that decides to evaluate its operations must ensure the process does not overburden its volunteers' time and efforts. The McGill Institute for Learning in Retirement is an example of a volunteer-led organization that initiated a self-assessment project to discover the strengths and weaknesses of its program.

1.3 Purpose of the Study and Preliminary Research Questions

The purpose of the study is to describe and analyze the two-year change process that took place within this small volunteer organization. I wanted to discover whether the spirit of dialogue was present in a volunteer organization founded on peer teaching and learning, and if it was, did it smooth the process of change and increase the organization's chances for survival. The purpose of the study and the questions that guided the study are shown in Table 1.

Case study is the preferred research strategy to study contemporary phenomenon (Yin, 1994). Change is elusive and I had difficulty formulating my research questions into explanatory questions. Such questions are helpful to explain "operational links needing to be traced over time" (Yin, p.6) and a "set of events over which the investigator has no control" (Yin, p.9).

The overarching study question was: How does a volunteer organization teach itself to survive? To respond to this question, I needed to look at how volunteers responded to change and how volunteers managed change.

Table 1
Purpose of the Study and Preliminary Research Questions

Purpose	Research Question
To describe and analyze a change process within a small volunteer organization.	RQ1 How do volunteers respond to an apparent need for change? RQ2 How does a volunteer-led organization manage change?
To discover the spirit of dialogue.	RQ3 Is the spirit of dialogue present in the change process?
To provide a document for McGill ILR and other volunteer organizations.	RQ4 Which research strategy is appropriate?

At the outset of this study, I assumed that organizations, like individuals, continue learning and that people who are aware of this

fact are more accepting of change. My questions attempted to respond to the uncertainty I heard some members express about the value of self-assessment.

1.4 Key Terminology and Definitions

This study uses terminology and acronyms which have become familiar in the context of ILRs. The terms are defined in Table 2.

Table 2
Key Terminology and Definitions

Term	Definition
CCE	McGill Centre for Continuing Education, the sponsoring host of McGill ILR.
Councillor	Member of McGill ILR Council, its governing body.
Dialogue	A process for encouraging open-ended discussion that attempts to free participants from fixed perceptions.
Host university	The sponsoring university which provides ILR volunteers with professional guidance and access to university services.
ILR	Institute for Learning in Retirement - A not for profit educational organization run by older volunteers who design and administer their own program of intellectual and social activities in collaboration with a host university.
Member	A person becomes an active member of McGill ILR when s/he registers for a study group.
Member-led organization	An organization led and run by its members on a voluntary basis.
Moderator	An ILR member who prepares an outline then facilitates or guides the discussion in a study group.
Peer learning	Signifies self-directed learning in groups among older adults using presentation and discussion, without experts or lectures.

Term	Definition
SIP	Seniors Independence Program, a program of Health Canada which offered funds to educational organizations.
Staff	Workers hired and paid by the university who help administer the ILR as distinct from volunteers.
Study group	A discussion group that practices peer learning; 7 to 20 participants meet once a week over a 10-week period.
Volunteer	ILR members who take on the responsibilities of management and leadership without pay.
Volunteer-led organization	A not for profit organization run and led by its members on a voluntary basis; that is, without salary.

1.5 The Organizational Context

Institutes for learning in retirement (ILRs) are not traditional student communities although they are situated on the campuses of North American colleges and universities. The first ILR was established by a group of retired school teachers who were dissatisfied with programs their union offered for retirees. In 1976, a national conference helped to promote the expansion of the ILR concept (Young, 1996/7).

The establishment of Institutes founded to promote peer teaching and participatory learning among seniors was unique within university milieux where teachers are differentiated from students. Although most institutions for higher education recognize that older adults are self-directed learners (Merriam, 1993), they continue to confine their course offerings to conventional

teacher/student relationships. The ILR model offers an alternative to seniors who want to continue learning.

This surge of interest by older adults who wished to continue learning at their leisure and for pleasure has grown to such a dimension that it is known internationally as the learning-in-retirement movement. As specialized learning organizations for seniors, ILRs refute stereotypes about aging: members are expected to take an active role in the ILR's various activities whether they participate in a study group, moderate a study group, serve on a committee or assist in the office. Each organization of seniors creates its own Institute to suit the intellectual and social needs of its community. ILRs are established in collaboration with a host university and provide volunteers with professional expertise and administrative services.

1.5.1 History of McGill Institute for Learning in Retirement

In 1984, a few seniors discovered fertile ground to instigate change at McGill University. Older adult students from the Centre for Continuing Education (CCE) wanted something more than evening lecture courses and they were encouraged to explore ways of providing Montreal's seniors community with better access to university resources by the Administrative Director of the Centre (Fochs Heller, Barry-Gaboury & Clark, 1990). The Centre designated an advisory committee and a trial *Studies for Seniors* program took

place. It was discontinued due to low registration; but the idea did not die.

Two years later a new Dean of Continuing Education together with the Administrative Director renewed the Centre's commitment to seniors' education. A work group was formed to prepare a proposal for affordable day-time courses to meet the needs of older adults. The group looked at existing seniors' programs at the universities of British Columbia, Harvard and California at Los Angeles with two ideas in mind: to restrict the use of academic "experts" and to stress the peer aspect of learning. Using these criteria, the group unanimously recommended that McGill adopt the model developed by Harvard Institute for Learning in Retirement which stressed cooperative leadership and member involvement (Fochs Heller et al., 1990).

It is usually a formidable process to get new programs approved within a university; nevertheless, the proposal for a seniors' learning organization under the umbrella of the Centre for Continuing Education moved quickly through university bureaucracy. In May 1989 the Senate Committee on Continuing Education approved in principle the concept of the proposed "society" to provide non-credit learning experiences and requested the title be changed to "institute." This was subject to a confirmation of interest from the seniors community.

Changing the name from "society" to "institute" conferred legitimacy and status upon the young organization in the eyes of its founding members. As an independent program under the aegis of the

Centre, the By-laws state that McGill ILR would "offer, administer and conduct learning experiences for its members." It would be self-financing and collect membership dues; nevertheless, the university reserved the right to administer MILR funds through a Centre account. This financial arrangement is typical of many ILRs.

A Founding Workshop was held to stimulate interest and to recruit members. The head of the work group invited seniors to "enter into a dialogue about peer learning." Volunteers with the requisite skills came forward to take charge of curriculum, communications, finance and registration. At a brainstorming session, members developed a study group program by matching moderators with study topics. There were no officers and no titles at the beginning-- everyone did whatever work was necessary to get the organization started.

The program was mailed out and the response was enthusiastic-- 197 members registered for seventeen study groups. The numbers exceeded expectations and after final approval from McGill, members of the work group assumed leadership of the Institute. One of them agreed to serve as president:

> *"We soon found our recommendation accepted, the organization formed, our committee, the first Council and I the founding president."*

The Institute began its first term in the Fall of 1989 with a $40 membership fee (raised to $51 in 1993 and $55 in 1995) that entitled members to register for one study group and a second if space permitted.

Four years after starting up, MILR moved into its own premises in an office tower off campus. The move significantly increased members' sense of ownership: from classrooms scattered throughout the campus, the Institute became centralized into one location with an office and reception, three classrooms, a lounge and a kitchen. Access was much easier on Sherbrooke Street in contrast to the difficult climb some members faced to various McGill buildings, especially in winter.

The founding of the program and the move into a 'home' were significant events for members that confirmed combined volunteer skills could imagine and realise projects. Both events enhanced members' enthusiasm and pride of accomplishment in their organization and helped to consolidate McGill ILR's peer learning culture.

The Institute experienced steady growth since its founding in 1989 and close to 6000 seniors have registered for study groups. Active membership grew steadily and reached a plateau in the fall of 1994 (shown in Table 3); this occurred about midpoint through the evaluation project.

Whether or not further growth would threaten the Institute's survival was becoming an urgent question.

Table 3

History of McGill ILR Study Groups and Registrations

Year	No. Study Groups	Members Registered
1989/90	39	450
1990/91	43	412
1991/92	54	569
1992/93	54	706
1993/94	69	850
1994/95	70	999
1995/96	85	1009
1996/97	73	999

1.5.2 Background to the Evaluation Project

The evaluation project happened because there were government funds available for seniors' educational programs at that time. Two women championed the idea that McGill ILR would benefit by studying its successes and failures. The current Chair of the Curriculum Committee (who later became the Chair of the Planning Committee) and the Administrative Director of the Centre for Continuing Education (CCE) approached the Faculty of Education for advice. Together they realized that an overall evaluation of the Institute would provide insights into a key issue that was already arising: that the organization's growth and increasing complexity would tax the enthusiasm and commitment of core volunteers who had sustained the Institute since it was founded (Clark, F. 1990).

In the early 1990s faced with declining enrolment and government budget cuts, McGill University began to take steps to reduce its overhead. This climate of fiscal constraint made some leaders think it was time for McGill ILR to increase its possibilities of becoming self-sustainable and to plan for succeeding generations. With the help of McGill's Department of Administration and Policy Studies in Education (APSE), MILR filed an application for a grant with Health Canada's Seniors Independence Program (SIP) to finance a self-assessment project that would help the organization identify the strengths and weaknesses associated with the program and the management structure.

It was approved as a self-evaluation project with the stipulation that Institute members be in charge of managing it. A grant for $111,000 was awarded jointly to the three partners: McGill ILR, CCE and APSE. The government grant permitted the Institute to convene a SIP Planning Committee in the fall of 1993 to develop and implement the self-evaluation process.

I was introduced to McGill ILR at the moment it embarked upon the eighteen-month evaluation project. I was engaged to review the literature on seniors' learning programs and volunteer organizations which I presented to the Planning Committee. I found that researchers had barely looked at organizations run by older adult volunteers (Okun, 1982; Mills, 1993; Moskow-McKenzie & Manheimer, 1993a). The lack of research surprised me because of the dramatic growth in the number of programs devoted to seniors' learning (Fischer, Blazey & Lipman, 1993; Moskow-McKenzie & Manheimer,

1993b; Swedburg, 1993).

Professionals from APSE presented volunteers with a framework for preparing the terms of reference for the evaluation. The committee members revamped it substantially to suit their needs and prepared their own Terms of Reference for an Organizational Evaluation. The steps of the evaluation process were documented in the MILR Guidebook for Self-Assessment (Lusthaus, Browne, Clark & Fochs Heller, 1995). The guidebook provided a useful text that was widely distributed to other ILRs and seniors' organizations. The evaluation process was standardized for replicability, yet the complexities of administering an evaluation to volunteers are illustrated in this extract from the text written by a poetic SIP Committee member.

> *"For starters, we didn't proceed in so hierarchical a way... and most of what's described in section 1 was actually done by the committee...we had valuable input... and we heard a good deal about the importance of developing the right questions– a wise piece of advice." (p.12)*

1.6 Significance of the Study

As of April 1997, 214 ILRs subscribed to the Elderhostel Institute Network in North America with approximately 47,000 opsimaths; that is, members devoted to the practice of learning late in life. There were 54 affiliate institutes in development status. The significance of this study is aimed at increasing three levels of understanding: (a) McGill ILR; (b) Institutes for Learning in Retirement and (c) change in a volunteer organization.

This study is immediately relevant to McGill ILR as well as to an ILR audience; it also has information for colleges and universities that are hosting, or who are considering designing, intellectual activities for older adults. In Swedburg's (1993) survey of 370 Canadian colleges, universities and community centres--including museums, religious training centres and historical societies-- 120 had programs specially designed for seniors. In Moskow-McKenzie and Manheimer's (1993a) study of 430 seniors' organizations in the United States, 137 were ILRs. In addition, they estimated there were approximately 1200 community colleges and 12,000 multipurpose educational programs across the United States.

The study also has something to say to groups who struggle to perfect various forms of collective governance.

Chapter Two
Themes in the Literature

2.1 Introduction

Volunteer organizations are a particular type of organization to study. I found information on volunteer organizations in the literature on organizational behaviour, volunteerism and volunteer administration. The large body of literature on organizational learning and change is written for the profit sector and though relevant does not speak to the particular circumstances of volunteer organizations. The literature on dialogue is interdisciplinary and comes from such disparate areas as the arts, religion and management.

The intention of this chapter is to use themes to explain the nature of volunteers and the organizations they serve, to explore the concept of dialogue and to introduce the phenomenon of learning in retirement. Themes are useful for understanding why older volunteers engage in self-directed learning activities and how they respond to organizational change. This review privileges literature with a theoretical component, the idea being that critical perspectives are important to give a conceptual overview. Several concepts merge under the term institutes for learning in retirement and are discussed in this chapter under: volunteerism, volunteer organizations, organizational learning and change, dialogue and learning in retirement.

2.2 Volunteerism: The Nature of Volunteers

The literature on volunteers gives some valuable insights into the complexities of the older volunteer personality. This section explains why people volunteer and what volunteers have come to expect from organizations.

The Journal of Volunteer Administration makes a distinction between "volunteerism" and "voluntarism" and offers the following working definitions for journal submissions: Volunteerism is "anything related to volunteers, volunteer programs or volunteer management regardless of funding base" and voluntarism is "anything voluntary in society, including religion; basically, voluntary agencies (with volunteer boards and private funding) which do not always involve volunteers" (Fischer, 1993).

2.2.1 Volunteer Motives

The Schlindler-Rainman (1980) study found that retired people made up the largest component of volunteers, next to teenagers and housewives, and that their primary reason for volunteering was to continue using their skills to benefit others. Nonetheless, little is known about why and how people volunteer for organizations (Pearce, 1993). Generally, the underlying motives are complex personal reasons. Abdennur (1987) and Fischer & Banister Schaffer (1993) identified an "altruistic older volunteer personality" that is

suited to and satisfied with the volunteer role. Abdennur found definitions inconsistent and often contradictory, nevertheless he tentatively attempted a generalization:

> *"Volunteers generally appear to be well socialized individuals who view themselves as sensitive to other people...they appear to be conservative in their social and political views...flexible in their attitudes, tending to be tolerant of others' views...their attitudes appear to be influenced by the values they are exposed to in their volunteer work...their ideological positions seem to be neither strong nor clearly thought out." (p.41)*

The researchers mention the "altruism debate" which controversially suggests that volunteer motives may be more selfish than would be suggested in self-report surveys. I also found the following comments to be consistent among researchers (Schlindler-Rainman, 1992; Pearce, 1993, Fischer & Banister Schaffer, 1993): Older adults are attracted to volunteer for organizations that provide opportunities for learning, personal growth and socialization. They volunteer for a particular opportunity or a cause and do not volunteer in any abstract sense. Older volunteers more willingly offer their services to organizations which are prestigious and visible in the community, which are well-funded and where members are well-educated. These characteristics have generated a circular effect: high status organizations attract high status volunteers.

Although the benefits of volunteer work may not be as concrete as paid work, individuals enjoy the opportunity to learn about the culture of a particular organization. This motive, while

prompted by self-interest, positively influences the individual's commitment and ultimate contribution to the organization (Pearce, 1993).

2.2.2 Volunteer Expectations

A study of 800 volunteer organizations found that people joined organizations "to do" rather than "to learn"; nevertheless the doing required learning activity. The activities named were: apprenticeship learning, learning from experience and learning through social interaction. The study concluded that volunteer organizational activity of all kinds is a vehicle for the personal development of members (Percy and Others, 1988).

Another study found that although volunteerism offered opportunities for personal growth, the work performed must also be meaningful. Retired people counteract the alienating effects and isolation experienced in mass urban society by volunteering, nevertheless they want to maintain their independence in the workplace. Volunteers do not integrate into the organizational system like paid employees, preferring to form social bonds with each other (Pearce, 1993). The study also found that volunteer interaction with their peers was more meaningful to them than their commitment to the organization.

Older people feel they are effective and not wasting time when their volunteer tasks are perceived to have some value within the

organization. They want to be creative in a clearly defined job and avoid problems of authority. Volunteers expect the organization to provide guidance and reinforcement so that their contributions become practical and meaningful (MacLeod, 1991). One problem is that volunteers often perceive their usefulness differently from the organization and they perceive they offer more dedication, sincerity and a more personal touch than salaried staff.

The frustration most volunteers experience is not being adequately recognized by their organization. Half of the organizations in Schlindler-Rainman's (1980) survey simply spoke to each volunteer about having done a good job; more than ten per cent did or said nothing. Small percentiles presented medals or certificates, or honoured volunteers at social gatherings or rewarded them by promotions to increased levels of responsibility. Most unpaid workers considered these insubstantial gestures alienating and named better ways for an organization to show appreciation: assess volunteer time in budget terms; provide clear-cut job descriptions and time record systems and organize training opportunities to improve skills.

A survey of a women's volunteer organization examined five factors of voluntary participation: community involvement, organizational efficiency and flexibility, sociability and affiliation, leadership and self-development and status attainment and maintenance (Bonjean, Markham & Macken, 1994). The findings suggest organizational success is influenced by volunteer attitudes and behaviours and the "fit" between member predispositions and

organizational rewards.

2.3 Volunteer Organizations

This section looks from the organization's perspective to explain what is expected from volunteers. Although the study of organizations has increased significantly during the past twenty years with a proliferation of literature on organizational management, much of the focus is on profit-generating corporations where revenues determine profitability and sustainability (Argyris & Schon, 1978; Isaacs, 1993; Senge, 1990; Watkins & Marsick, 1993). Pearce's extensive empirical study of unpaid workers in "formal organizations"; that is, hospitals and universities, offers insights into volunteer behaviour, even though he does not include organizations with volunteers who are "owners or members of cooperatives" (p.7).

Community organizations realize that volunteers are an indispensable human resource and that the mutual benefits are enormous. Each satisfies the other's needs: the worker provides unpaid assistance and the organization, in turn, provides an activity for personal development. Problems arise when these expectations are not adequately fulfilled (Pearce, 1993).

The main reason organizations engage volunteers is that they bring new ideas, enthusiasm and particular skills; only five per cent cited low cost as a factor (Schlindler-Rainman, 1980). Nonetheless,

the exchange has certain drawbacks for organizations. Traditional altruistic volunteerism which stresses the Judeo-Christian ethic of charity persists within sectors of the older adult population (Abdennur,1987). This altruistic tendency to avoid conflict negatively affected the atmosphere of an organization over the long term and the unwillingness of volunteers to discuss their dissatisfactions openly, or to mediate resolutions, built up internal tension that required special leadership skills to resolve.

2.3.1 Management of Volunteers

Organizations reported experiencing difficulties recruiting volunteers who were competent to fill essential jobs. The most common, yet limited, method of recruitment was personal referral. Yet, less than half the organizations surveyed by Carter (1975) provided volunteers with orientation, training or job descriptions. De Board (1978) found that organizations wishing to improve morale offered volunteers appropriate positions and allowed opportunities for them to become actively involved.

Organizations often placed volunteers in management tasks such as financial planning, staffing and supervision without adequate training and expected them to learn on the job (Fisher & Cole,1993). The organizations felt they were not in a position to specify management skills as a condition for engagement. However the practice of giving authority to unqualified individuals caused internal problems and discouraged potential volunteers from

tackling unfamiliar jobs they felt unqualified to fill.

Organizations are not known to consult the literature on volunteerism and are generally unaware that shared values and collaboration are important to volunteers (Fischer and Banister Schaffer, 1993). Numerous organizations had prepared handbooks for their volunteers that were not based upon research; nor were demographic projections consulted during recruitment. Matching tasks to individual abilities was not a priority even when management knew that matching volunteers to appropriate positions increased their commitment. Organizations were more concerned about how to hold volunteers accountable to performing and attending consistently. Management tended to counteract unreliability by encouraging volunteers to treat the organization as "their club."

Organizations face several challenges in retaining volunteers, especially retired professionals with previous management experience. Peterson and Orgren (1982) found: (a) turnover is affected by situations and is highly unpredictable; (b) individuals tire of contributing; (c) older persons' mobility is reduced and (d) new volunteers need extra time to be cultivated and supported. To meet these challenges, the researchers suggested that organizations budget additional funds for paid staff so as not to overburden volunteer efforts and enthusiasm-- especially during a period of planned change.

2.3.2 Leadership

Research indicates that volunteers who ignored formal bureaucratic authority generally responded enthusiastically to leaders who embodied strong personal commitments to the organization. Leaders who set direction and encouraged others to share were better able to accomplish their vision. For this reason, visionary leadership within organizations was known to increase commitment and counteract volunteer independence or indifference (Pearce, 1993).

Fisher & Cole (1993) cautioned leaders to be sensitive to the perception of volunteer tasks within the organization, to conceive appropriate policies and procedures and to provide satisfying benefits and appropriate recognition. Current leaders had to know how to groom new volunteers for leadership roles within the organization and had to be able to initiate them into organizational culture if they wished individuals to assume more responsibility. Organizations which utilized peer teaching and mentoring to groom leaders also enhanced the quality of their program.

2.4 Organizational Learning and Change

This section presents some of the major concepts and frameworks that have been used for studying organizational learning and change. Most theorists concur that sustainability is achievable for organizations which continue to learn.

The Concise Oxford Dictionary defines change as the substitution of one for another; the arrival at a fresh phase in a never-ending process-- like the moon in its phases. Change is a slippery process to study as the degree and speed of change varies within the context of each organization. An organization staffed by volunteers is vulnerable to change with its turnover of part-time workers and its short-term leadership. Without a belief in the possibility of studying change and without adequate resources for a study of the process, non-profit organizations put at risk the achievement of long-term sustainability. The phenomenon of change is neither "good" nor "bad"; it is simply inevitable. Change happens in different rhythms; it may be planned or it may arrive unexpectedly.

Much of the literature associates learning with change; that is, an organization learns about itself as it adapts to change. To be capable of learning, an organization must demonstrate a capacity to initiate change at different management levels and be willing to examine its own fundamental assumptions (Senge, 1990; Watkins & Marsick, 1993). An organization develops a memory that is transmitted through ideologies; although workers come and go and leadership changes, values and norms should remain constant (Hedberg, 1981).

Argyris and Schon (1978), assuming that organizations in general failed to learn, developed questions to test whether individuals could detect an organizational problem, carry out an inquiry and act from their discoveries. To make a change in

organizational practice individuals had to learn to reconceptualize the "maps, images and organizational practices" which had become so institutionalized they were unaffected by a leader's departure. Argyris and Schon (1978) found that each step of organizational "single-loop" learning was fraught with potential failure. In single-loop learning, the response to change is to "detect errors" and then to act to "correct" them. This leads to mismatches between expectations and outcomes. For "double-loop" learning to occur, an organization had to inquire into cherished norms and strategies and seek out inconsistencies embedded in the organization's cultural memory.

Argyris and Schon (1978) discovered that an organization learned as it synthesized fragmented perspectives: as group, as agent, as structure, as system, as culture and as politics. For Fiol and Lyles (1985) the health and survival of organizations was determined by studying whether (a) its culture was conducive to learning, (b) its decision-making strategies were flexible and (c) it had a decentralized structure that allowed for innovation. For Senge (1990), contextual factors were secondary. He emphasized the importance of leaders who could communicate and implement a shared vision as a primary condition for surviving change.

Organizational change cannot function without the involvement of employees in decision-making and information sharing. It is the willingness to involve employees in the search for continuous improvement that defines the learning organization (Arkin, 1993) and the organization that is attentive to the individual worker's

contribution learns how to incorporate collective solutions. An effective method for enhancing group thinking to promote positive change came out of Lewin's (1948) method of action research. He found:

> *"... the properties of a group, such as its organization, its stability, its goals, are something different from the organization, the stability, and the goals of the individual in it." (p. 73)*

Action research, as a fundamental concept for organizational learning, is rooted in the belief that people who collect and analyze data together can take effective action. When people examine facts in a specific context individual understanding expands and the group, collectively, can see what needs to be done (Watkins & Marsick, 1993).

The distinction between organizational and individual learning is critical, especially for volunteer organizations where individuals work independently. An organization is not the sum of each member's learning, but it is affected by the learning of individuals (Fiol & Lyles, 1985). Watkins and Marsick (1993) and Kim (1993) found that individual and organizational learning are interdependent. To be a learning organization, management had to encourage information sharing and member involvement; that is, a learning organization:

> *"accelerates individual learning capacity but also redefines organizational structure, culture, job design... and involves employees in widespread participation... in decision making, dialogue and information sharing" (Watkins & Marsick, 1993, p. xii).*

Organizations which help workers think in more complex ways can increase their own capacity for managing change. For example, Dawson's (1994) extensive study into how change events precipitate organizational change provided the framework for my case study. The promotion of learning climates in organizations represented a possibility that organizations are emerging into a new age where mistakes are tolerated and learning and improvement are highly valued (Karpiak & Kops, 1995). Watkins and Marsick (1993) described technologies for "learning through action" so that individuals saw the parts that made up the organizational system and saw how change affected them. Specifically, it is the individual who changes rigid organizational structures, policies, procedures or group culture-- bit by bit. For this reason, management must be open enough to listen to controversial thinking and expect challenges to its authority.

Researchers made a six-year study of one organization's attempt to develop leadership teams capable of implementing strategy and learning (Beer & Eisenstat, 1996). The teams of leaders developed a self-diagnosis process intended to improve capacity to achieve systemic change and partnership with their employees. Unexpectedly, the process did not appear to have increased the company's capability for organizational learning.

For Senge (1990) organizations require leaders who understood group process enough to balance the idiosyncratic strengths of individual group members. In this way, leaders could translate their personal into a collective vision. Senge's "learning laboratories"

gave managers firsthand experience on how actions created reality (Kim, 1993). Dialogue was one method used to help leaders look at reality from fresh angles and turn problems into learning opportunities.

2.5 The Spirit of Dialogue

This section describes the interdisciplinary nature of dialogue and how the concept of dialogue is interpreted contextually in different disciplines. The management literature lauds the trend in corporations toward implementing participative problem-solving processes, yet there is still a need to design and assess these initiatives through critical open dialogue (Larson, 1991). According to Bohm & Peat (1987), dialogue signifies openness, a willingness to engage in discussion, the patience to listen, the withholding of judgment. The term means a discussion between people or between groups of people. Dialogue is derived from the Greek: "dia" meaning "through" and "logos" meaning "the word"; hence: "meaning through words". Webster's Dictionary defines dialogue as: "interchange and discussion of ideas, especially when open and frank, as in seeking mutual understanding or harmony."

The educators, Argyris and Schon (1978), and the physicists, Bohm and Peat (1987), used similar language to describe a crisis of perception afflicting institutions-- specialists cannot talk across specialities. Another problem, especially in the increasingly profit-oriented sector is that time is no longer flexible, it has become a

constraining force. A common complaint in organizations is that there is a lack of time for discussion or inquiry. Greene (1990) observed a general withdrawal from public concerns and silence where there ought to be dialogue. Individuals remain speechless without adequate opportunities to talk with and listen to co-workers. Some organizational climates are so threatening that individuals are inhibited from expressing themselves honestly. For whatever reason, people in groups rarely have the opportunity to speak their personal truths.

In their investigations, Bohm and Peat (1987) found that this disregard for open expression was also infecting academic and scientific disciplines-- milieux that were supposed to be open to questioning and change. They pointed out that overspecialization had fragmented scientists' understanding of the universe to the point that some were unable to communicate, even among each other, how their work related to questions of society and human consciousness.

Bohm and Peat's concept of dialogue resembled another educator's description of discussion:

> *A necessary condition of discussion is that there be no preconceived agenda, no cognitive path to be charted, no previously specified objectives either for substantive knowledge to be transmitted or for process features to be exhibited. Hence guided discussion is conceptual nonsense in that discussion is free and open by definition (Brookfield, 1991, p.189).*

Bohm and Peat's ideas stemmed from the group work done by psychiatrist de Maré (1985). They believe that dialogue is more than getting groups to talk to each other, it:

...may well be one of the most effective ways of investigating the crisis which faces society...for transforming culture and freeing it of destructive misinformation, so that creativity can be liberated." (p.240)

Groups utilize the dialogue process when they wish to alleviate misunderstanding, to resolve conflict or to intensify social interaction. It is not abstract, nor is it mere discussion nor debate-- dialogue has codes of behaviour and speech (Appendix E). When practised in good faith, dialogue encourages collaboration among individuals so that they may discover common solutions to perceived problems. The dialogue method scrutinizes an organization's fundamental beliefs and is especially useful in conceiving new criteria for survival during periods of transition.

Dialogue is intended to break down hierarchical preconceived relationships. A conventional classroom situation is radically changed into a space where the teacher learns and the learner teaches. Dialogue happens when a group gathers to communicate ideas, information and experiences. Humanist educators who named this process discussion found it to be at the heart of adult learning methods (Brookfield, 1991). Knowles (1980) honoured group discussion as the best way to help people learn since he entered the field in 1935.

Both liberal humanists and radical adult educators maintain that discussion groups serve to develop critical judgment and foster democratic habits. They are inclusionary; they respect everyone's participation and they place teachers and learners on an equal footing. In dialogue, learners' intuitive and emotional reactions are

stimulated and attitudes are changed through problem solving and concept exploration (Shor & Friere, 1987; Knowles, 1980; Vella, 1994, 1995).

In the literature on organizational change, I discovered that Isaacs (1993) surmised dialogue to be a reflective process and had employed it to assist employees and managers to learn new concepts. Isaacs found that his method of "triple-loop" learning allowed workers to feel comfortable questioning how they learned in fixed patterns and that they were able to open up levels of inquiry that permitted deeper insights into problems. Although the process seemed risky to employees and managers at the outset, the overall experience was that the dialogue process had a transformative effect. Isaacs' theory on the evolution of dialogue is further described in Chapter Five.

The process of change is ineffective if individuals feel that the dialogue has been controlled or that the outcome has been premeditated- - group leaders must not control the direction a dialogue takes as there is no right track (Bohm and Peat, 1987). Isaacs' study found that dialogue goes nowhere if inquiry is cut off or if people hold onto fixed positions. Organizations which are able to hold diverse points of view in suspension foster the spirit of dialogue.

2.6 Learning in Retirement

The theme of learning in retirement explains why members of the older adult population are returning to universities and colleges in their retirement years and why they volunteer to run their own learning programs. Since the early eighties, there was a substantial increase in the demand for college and university programs serving the older population. Though the numbers of older adults has risen dramatically, their educational level has not kept pace-- older people with less formal education are not inclined to participate in further learning (Waskell, 1982).

The willingness to participate in new learning activities is correlated to an individual's level of education and socio-economic background (Peterson and Orgren,1982). Yet as we age, a major obstacle we experience in a culture obsessed by youth is to overcome the prevalent attitude that the retirement years are a time of decreased productivity and increased dependency. Studying change in adulthood has moved from the simple view of "ages and stages" so that researchers are now looking at how issues of gender, politics and authority and social milieu influence individual change (Tennant & Pogson, 1995).

To assume that the characteristic environment of seniors is void of intellectual stimulation is to construct a self-fulfilling prophecy. Agruso (1978) contradicted assumptions made by educational gerontologists who regarded older adult learning as a complicated set of behavioural and/or cognitive conditions. He

found older adults have the capacity to learn new concepts well into their 60s and 70s and that the desire for intellectual pursuits is determined more by cultural, economic and social conditions than biological aging. To learn new things and to benefit from new experiences, especially when the learning environment is welcoming is not determined by age alone. Seniors, like other adults, learn best when they can contribute to group activities and have some control over what they learn (Brockett & Hiemstra, 1991; Merriam & Caffarella, 1991) such as taking on a project and developing it in a way that is relevant to their own experience and interests (Agruso, 1978; Clark, D. 1995).

Agruso (1978) found that seniors were not participating in educational programs designed by institutions for higher learning because their needs were not being met. About the time of Agruso's studies, retired adults began to volunteer their expertise and energy to create their own learning programs within colleges and universities, which later became known as institutes for learning in retirement. Peterson and Orgren (1982) found that senior adults, particularly after retirement from a full-time occupation, joined groups to reestablish contact with their peers to offset a sense of isolation. A peer learning group has the advantage of providing a supportive atmosphere to reflect upon ideas before trying them out in other, perhaps less receptive settings. By building social support, camaraderie and a spirit of community, groups provided an informal network that enhanced each member's identity. Groups served to build relationships that respected diverse perspectives and when members enjoyed themselves, the team spirit affirmed stronger

peer bonds.

From the data collected during McGill ILR's self-assessment project, it was concluded that the peer learning model was popular because it offered seniors an effective and beneficial educational experience. Though the nature of the learning varied according to the participation levels of the study group members and the teaching styles of the moderators, the rewards can be simply expressed: the more one participates, the more one learns (Clark, Fochs Heller, Rafman & Walker, in press). The fact that ILRs favour the peer learning model demonstrates seniors desire to set their own direction beyond the traditional classroom toward continuous learning (Clark, Rafman & Walker, 1997).

Since the mid-1900s adult community colleges have responded to increased demands for adult learning in traditional ways with alumni colleges (Mills, 1993). Nevertheless there was a dramatic increase in the number of programs in the 1980s. Two surveys documented the increased demand for older adult learning courses. The Canadian survey by Swedburg (1993) found: 13% responded that older adults are involved in the administration of the program, 25% in the design and 28% in the teaching; about one third reported that volunteers were active in the operation of their program; and only six programs were 'member-driven'. In the United States, the Moskow-McKenzie and Manheimer (1993a) survey found that almost one third of the programs were managed by peer volunteers and self-financed through membership fees.

Studies of participants in Elderhostel programs found they were motivated by a desire to continue learning and to make sense out of older age (Rice, 1986; Wolf, 1990). Elderhostel, which is a different concept of retirement learning, offers specialized site-specific short-term residential programs in affiliation with university campuses (Mills, 1993). The hostel program has witnessed astonishing growth, a rate of 20 to 30 per cent per year. Contrary to ILRs, local programming is managed by a centralized national headquarters in Boston.

In the late 1970s and early 1980s centres for seniors' learning developed independently as grass-roots organizations at the New School for Retired Professionals in New York, at Harvard and at U.C.L.A. (Elderhostel Institute Network, 1990). Some were inspired by les Universités du Troisième Age initiated in France and by the sixty-year tradition of study circles in Sweden (Study Circles Resource Center, 1993). In 1987, Elderhostel saw an opportunity to develop ILRs and took on a central role. The Elderhostel Institute Network (EIN) was established to coordinate ILR activities and facilitate new development and a Canadian EIN office was set up in Kingston, Ontario.

One argument for the popularity of seniors' learning programs is that they build stronger peer bonds and satisfy older adults' need for intellectual stimulation and social interaction. The success of ILRs is attributed to the mutually beneficial collaboration and the degree of trust established between the educational institution and the older "student" (Fischer, R. B. et al., 1992). ILRs provide

"intellectually restless seniors" with an opportunity to determine their own learning programs. An ILR's distinguishing characteristics are: they are member-led in collaboration with the host university; they are primarily funded through membership fees and they are dependent upon volunteer workers (Elderhostel Institute Network, 1990).

ILRs have changed the retirement years to reflective years that support lifelong learning. The 'third age' (Fischer, R. B. et al., 1992), a term more widely used in Europe and Asia, denotes the time of life after an individual has fulfilled her or his full-time professional and/or domestic responsibilities. It begins after 50 years of age and is recognized in most cultures as a time of wisdom. The following quote describes how attitudes to "learning in elderhood" have changed:

> *There are surprising changes in the present cohort of elderly people from those that preceded them. On the whole, they are not poor: the percentage of those over the age of 65 who live below the official poverty line has dropped from 30 to 10. More of today's retirees have already experienced continuing education, likely in support of their jobs. And a growing proportion of them have travelled, and enjoyed a range of cultural events. The influence of these changes finds them looking back at and revising what education, work, and leisure have meant to them. (Miller, 1992, p.2)*

Bynum and Seaman's (1993) study of six ILRs in the southeastern United States supported the conclusion that the intellectual curiosity component was the strongest motivator for participation in continuing education. Their suggestion was that an intellectually stimulating curriculum was a pivotal factor in

determining the success of an ILR program. The study repudiated their hypothesis that interpersonal and social motivators would be paramount; seniors' foremost motivation is the desire to learn. They concluded that older adults seek cognitive growth, not simply social interaction; and that ILRs represented one of the most creative ways for higher education to welcome back older students. A primary factor was the opportunity to offer additional involvement in the program's administration and instruction.

Young (1992) proposes ILRs have eight common characteristics that contribute to their success, one of which is the opportunity for participants to become involved in planning, implementing, evaluating and teaching. Above all, an ILR satisfies seniors' needs for intellectual stimulation and social interaction among peers. Learning is growing as an activity of leisure (Miller, 1992), yet in spite of the popularity of the ILR model, universities and colleges are still designing conventional expert-led educational programs for older adults, the majority of which are "institution-driven"; that is, they are administered by the university not the member-volunteers (Moskow-McKenzie & Manheimer, 1993a; Miller, 1992). Researchers have not yet investigated why "member-driven" institutes thrive.

2.7 Conclusion

The literature confirmed that, in time, most organizations come to face crucial issues which demand rigorous questioning and

soul-searching into cultural values, governance and leadership. To be sustainable, groups must understand and plan for change; however, peer-led groups of volunteers often lack empowering leadership to ease the transition into another phase of growth (Starhawk, 1987).

When I finished writing this thesis, I went back to the literature to update the information on action research and training techniques that were relevant to my study of organizational learning and change.

In an update on Chris Argyris, now an "elderly sage of management" at 73 years, Pickard (1997) described some new lessons Argyris has to teach: that the "benign dishonesty" afflicting organizations is caused by people's refusal to speak the truth mainly for fear of damaging their own or another's future prospects. As a result, organizations never learned and change remained superficial. Argyris criticized traditional communication tools such as focus groups and opinion surveys that did not uncover the underlying problems which were often rooted in the way people related to each other and in individual behaviour. One suggestion was for people to witness defensive behaviours by having them write imaginary scripts before meetings, tape the sessions and then read the written transcript of their dialogue.

In other action research projects, researchers developed a learning laboratory and used "before and after" interviews to explore the roles, perceptions and learning needs of internal change agents (Hartley, Benington & Binns, 1997). Finney (1996) found

workers must be willing to let go of tasks that no longer fit and encouraged people to open up about themselves by telling stories of past learning experiences. Argyris' new definition of organizational learning stressed the importance of leaders being able to reproduce their insights in the everyday world (Pickard, 1997).

A study and comprehensive review of the strategic change literature that looked at 15 case studies grounded in the "learning lens perspective" reported conclusions were tentative because most researchers employed idiosyncratic definitions of environmental variables and managerial actions and this hindered comparability across studies (Rajagopalan & Spreitzer, 1997). A general conclusion was proposed: managers frequently changed organizational structures and systems in the course of strategic change. The strength of this holistic learning lens perspective lies in its rich descriptions of managerial actions shaping workers' readiness and/or resistance to change.

A study of a change in the presidency of the American Red Cross, which relies on 1.44 million volunteers, described the president's new strategies: (a) give volunteers real power, (b) manage the team and work with the individual and (c) handle change one day at a time (Staroba, 1996). "Real power" meant giving volunteers the right to control decisions, the money and the nominating committee. One result of this change was that volunteers who were good at getting new volunteers into the organization ended up on committees and on the advisory board. An important aspect of the new "do the next thing next" approach was

that it required leadership and risk taking and depended upon volunteer commitment and accountability.

In a Conference Board Report only 54 per cent of major companies surveyed said they had leaders who could respond effectively to change. In the study of corporate leadership training methods (Csoka, 1996), organizations discovered that training can work if it is part of a larger development process, known as "values-based competencies." This process gives people skills to lead during times of turbulent change and to create a shared vision of what the organization might become. A practical perspective marked leaders who could learn, who worked "with the grain", who were clear about what they wanted to change and who were responsive to others' views and concerns; that is, they integrated doing and learning (Binney & Williams,1995).

In an innovative program for sustaining cultural and organizational change, the vice chancellor of the Open University in England put theory to the test and asked training and development to develop a strategic "new directions" plan for OU (Russell & Parsons, 1996). The program, implemented in 1993, mixed university staff across organizational boundaries and levels of responsibility to promote better communication. The action groups, led by employees who prepared workshops and videos, were so successful that people were volunteering to attend. The research team determined that organizations should worry less about management control and more about providing support information and infrastructures that allow people to organize themselves.

Dialogue is further developed as an interactive tool for leading change (Maccoby,1996) and for the successful management of change; for example the conceptualization of the process yields knowledge about the dynamics of change and provides increased opportunities for intervention (Fruytier, 1996).

The literature confirmed that change, like learning, is a process that cannot be managed prescriptively-- a flexible approach is needed. Janes' (1995) case study of the restructuring of the Glenbow Museum in Calgary states that researchers can best get to know organizations through direct participation and that "continuous learning" is the best term to explain the "roller coaster ride" of organizational life. The book of his experiences is a work in progress-- chapters will be added as the organization adapts and changes.

The review of the literature substantiated some commonalities in volunteer behaviour that I had experienced during my study. The literature on organizational learning warned me about the problems volunteer organizations habitually ran into: unfulfilled expectations, continuity and retention. This led me to look further and question the particular characteristics of an ILR that made it support or hinder change. My intuition was that in spite of volunteer turnover and/or burnout an ILR could continue to manage the increased complexity that growth naturally entailed because of its collaborative system of governance and its sharing of administrative tasks with the host university. This idea is

substantiated in an article about the mutual benefits of improving university services for older students (Young, 1996/7).

Chapter Three
Methodology: A Case Study of Change

3.1 Introduction

The case in this study is the process of change undergone by the McGill Institute for Learning for Retirement during its self-evaluation project. The case analyzes significant events and decisions that marked moments when change became perceptible; that is, there was a noticeable difference between "the before" and "the after." Chapter Three describes my method for analyzing McGill ILR's self-assessment data.

Case studies depend upon the investigator as the primary research instrument (Yin, 1994) and it was important to clarify my role as a participant observer and my research techniques to the Planning Committee at the outset.

3.2 Case Study Method and Analysis

Historically, case study research came from the disciplines of medicine and law. Case studies have since developed in importance in such fields as management, psychology, sociology and social work and have been used in education to explore the process and dynamics of change (Merriam, 1988). As an inductive method, case study is suitable to investigate a process and to synthesize diverse and

sometimes contradictory aspects of organizational behaviour. (Pearce, 1993; Merriam, 1988). The descriptive case study can be used to investigate a phenomenon within its real-life context, when the researcher believes that contextual conditions are highly pertinent (Yin,1994). Case study was appropriate therefore for an examination of a change process within a volunteer organization. My method was to examine McGill ILR's history, its culture and its governance in order to determine whether it was self-sustainable.

The prime advantage of a case study is that the analysis phase takes place as data are collected (Anderson, 1990; Ely, Anzul, Friedman, Gerner & McCormack Steinmetz, 1991; Merriam, 1988). As a research strategy, it encompasses data collection, design and analysis and explains causal links in everyday situations and interventions (Yin, 1994). These links, or patterns, are difficult to perceive in the short term so that I benefited from being present during the follow-up period after the evaluation was completed.

Case studies vary in design yet many share a common ground between quantitative and qualitative researchers (Yin, 1994). Some follow ethnographic methods utilizing detailed observation and avoid prior commitment to a theoretical model (Yin, 1994). Instead foreshadowed problems and experiential knowledge guide the study (Hammersley & Atkinson, 1983). I inherited my foreshadowing from years managing a non-profit arts organization which struggled to survive and I had developed a skeptical attitude toward organizations using unpaid and underpaid labour. I wanted to change this attitude and discover what characteristics of an

organization ensured its future.

I followed the critical ethnographic method which begins with people in actual situations and links their activities to general phenomena in society (Smith, 1987). In this way, the reader understands how the microcosm reflects the macrocosm. Like interpretative researchers, I take language and meaning seriously so that my priority was unravelling people's descriptions of events (Hitchcock & Hughes, 1987). Hence first-person accounts are an important aspect of this study.

A study of change was complex to construct and I had little experience. My approach was guided by these principles:

> *Begin with the material. Pick up again the long struggle against lofty and privileged abstraction. (Adrienne Rich, 1986, p. 213)*

I relied upon my sense of what "rang true" as I sorted through comments and personal opinions that were often contradictory and contextual. As I came to know McGill ILR members better, I understood their comments often reflected personal histories and that the nature of part-time work meant that volunteers had partial information and this distorted their perspectives. Taking this into consideration, I struggled to synthesize what volunteer-members said with what others said and then related the discussions to what the literature said. I struggled to incorporate contradictions and to take into consideration what many volunteers reminded me of-- at this age memory was not always reliable.

I became more aware that reality is neither fixed nor

stationary-- it is also an ever-changing phenomenon. My approach was to take notes of both the content and the tone of discussions during meetings, interviews and focus groups and shape my notes into recurring themes and issues. After listening to what different volunteers and staff members said in formal situations, I interpreted what was being said against what was actually happening. I fine-tuned my research questions during the thesis writing process. As I became more familiar with McGill ILR's culture and politics, this holistic method proved trustworthy; this was substantiated in the literature:

> *In this type of research [case study] it is important to understand the perspective of those involved in the phenomenon of interest, to uncover the complexity of human behavior in a contextual framework, and to present a holistic interpretation of what is happening. (Merriam, 1988, p. 168)*

I selected data collected and analyzed by the Planning Committee for the evaluation project that illustrated the organizational behaviours and attitudes of volunteers.

3.3 My Stance as a Researcher and Role as Participant Observer

For me, the learning in retirement movement echoed the women's movement and our demands for equal rights to speak out, to be heard and to manage our own affairs. In 1984 I was one of a small group of women who established Cinémama as a film/video festival; it continued as a conference programming service to stimulate

discussion among women artists and the public (Consensus & Contestation: Dialogues, 1992). Our purpose was educational: to promote and document incidents and images of real people in real situations, struggling with real problems (Witherell & Noddings, 1991).

I constantly questioned my methods of investigation, followed comments where they led me and listened carefully to the differences in voices (Brown & Gilligan, 1992). Being a researcher in an educational milieu, I phrased my queries in a "consultative voice" (Vella, 1994) respecting individual sentiments. This meant not asking direct questions which might be misinterpreted as invasive, but rather asking individuals to elaborate their points of view. Fortunately, Planning Committee meetings provided the requisite "safe space" (Freire, 1973; Vella, 1994) for the free exchange of information.

Participatory research aims to develop the critical consciousness of both the researcher and the participants and to improve the situation of those involved in the research process (Maguire, 1987). Because one is never fully detached, it can be emotionally engaging and exhausting; it makes researchers challenge their own role. By doing participatory research, I was conscious of the fact that educational research is never neutral and that it generates implications within the chosen social milieu.

I attended Planning Committee meetings both as an ex-officio member and as a researcher paid by the McGill Centre for Continuing

Education. My role as participant observer meant listening to the discussions, taking double notes-- one for the Committee and one for my study. I felt privileged to be treated as a colleague which also allowed me freedom of access to information throughout the project. I contributed to the conception and implementation of the evaluation and attended weekly meetings, to keep the minutes and to categorize the data into reports. This was done in conjunction with sub-committees. The Planning Committee members were generally receptive to my ideas and I felt at ease to develop them more fully within reports (Rafman, 1994; 1995a; 1995b; 1996).

Listening is not limited to the aural faculty-- it means capturing the mood of the situation and reading between the lines (Yin, 1994). I had developed these skills as a film programmer and this proved invaluable during the focus groups, discussions and interviews. I corroborated my inferences using other sources of information and documentation (shown in Table 4).

This case study benefited from the joint efforts of the Planning Committee members who designed the data collection instruments: the terms of reference, the protocol for the moderator focus groups (Appendix A), the protocol for the key informant interviews (Appendix B), the Member Survey (Appendix C) and the Survey of Former Members (Appendix D). The reports on the focus groups (Rafman, 1994) and interviews (Rafman, 1995b) were drafted by me then refined by members of the committee who constructively edited and clarified my "imaginative reporting."

In addition to my experience as a working member of the Planning Committee, I spent three months at the close of the evaluation project working in the MILR office and learning how the Institute functioned on a daily basis. My observations and the lively, yet congenial, discussions with member-volunteers are detailed in the report on office requirements (Rafman, 1996).

3.4 Sources of Data

The sources of data and the techniques used for data collection are shown in Table 4. The focus groups and interviews encouraged open discussions among volunteers. The data is broad based and covers a view of the whole Institute, rather than a close-up of one particular aspect.

3.5 Scope and Limitations of the Study

My study began in October 1993 and continued until June 1996. This period comprised my time as a participant observer and member of the SIP Planning Committee and the subsequent months spent working in MILR's office and the Centre office.

Role conflict was an considerable limitation; that is, taking notes for the case study merged with taking minutes for the committee. Keeping the data separate was difficult; I tried to sort thesis "meta-data" from SIP data, but distinctions blurred.

Table 4

Sources of Data and Data Gathering Techniques

Research Question	Source of Data	Data Gathering Technique
	McGill ILR Volunteers	
1, 3	Moderators	Focus groups, survey
1, 2, 3	Key informants (leaders of MILR)	One-on-one interviews, survey, minutes, conversations
1	General members	Survey, records
1	Former members	Survey, records
	Staff	
1, 2, 3	CCE Administrative staff	Interviews, conversations, minutes
	People outside McGill	
2, 3	External advisors	Interviews, conversations
	Documents and reference material	
1, 2, 3	Personal notes from meetings	
1, 2, 3	Minutes from meetings	
2	Database records	
2	McGill ILR By-laws and Operating Rules	
1,3	McGill ILR Newsletters	
2	Elderhostel Institute Network documents	

Statements from the literature hindered some early interpretations until I realized that the generalizations in the literature on aging did not pertain to the intellectually healthy and capable individuals with whom I worked. The literature written for profit-generating organizations was prescriptive and not pertinent

to this volunteer organization (Fiol & Lyles, 1985; Senge, 1990; Kim, 1993; Watkins & Marsick, 1993). The study on the motivations of third-age students in ILRs focused on program content, but not program management (Bynum & Seaman, 1993). Other case studies gave me some insights into organizational change, but were not specific to ILRs (Beer & Eisenstat, 1996; Bonjean et al, 1994; Graham & Pizzo, 1996).

Some limitations of case study research proved true in my case. According to Merriam (1988), continuous and simultaneous data collection makes closure difficult and the amount of data makes weaving a coherent narrative also difficult. I absorbed these limitations into the study. Another limitation was the restriction to confine my study to the data collected during the evaluation project; the Planning Committee requested I not conduct independent interviews.

3.6 Conclusion

Case studies naturally shift orientation as they proceed (Yin, 1994) and I kept readjusting the focus of my analysis. This kept my insights and curiosity fresh and I did not feel restricted by methodological constraints. I struggled with an appropriate framework to analyze the data in my study and came across Dawson's (1994) processual approach (shown in Figure 1) late into the writing of this thesis; it stimulated a substantial revision of this thesis. To study change I traced it, using Dawson's framework,

from the conception of the project through the transition period of data gathering and decision making to conclude with new organizational operations. This process and presentation of the data is outlined in Chapter Four.

My personal involvement as a participant observer in the project benefited rather than limited the study. We met at least once per week and our mutual respect grew though the committee members' community values and social interaction differed considerably from my feminist arts milieu. I had freedom of access to personal information and records and the volunteers trusted me to respect their confidences. Therefore I was able to confirm my findings using data from multiple sources (triangulation). In conversations with leaders of MILR, I "pooled" and reviewed my interpretations asking whether the themes and issues were plausible. Our exchanges were enhanced as I stayed on site for nearly three years. As colleagues, we exchanged comments on the findings and many found my assumptions and theoretical orientation stimulating. Our dialogue helped me to maintain the flexibility needed to study whether elusive patterns and ramifications of change could be revealed in the short term. As events unravelled and evolved, the questions that arose in my mind were incorporated.

Case study method is the preferred method to explain a contemporary phenomenon, though critics of case studies state that single cases offer a poor basis for generalizing beyond the immediate case (Yin, 1994). On the other hand, a single case can demonstrate honest dialogue which links people across ages,

cultures and genders (Vella, 1994). The data in Chapter Four attempts to respond to these theoretical issues. Following the logic that, if another researcher duplicated the same procedures, s/he would arrive at the same conclusions is improbable because human (and thereby organizations of humans) behaviour is never static. Case studies of other evaluation projects which employ Dawson's (1994) conceptual framework should demonstrate representative findings though the identical circumstances of this case study cannot be replicated.

Chapter Four
The Process of Organizational Change

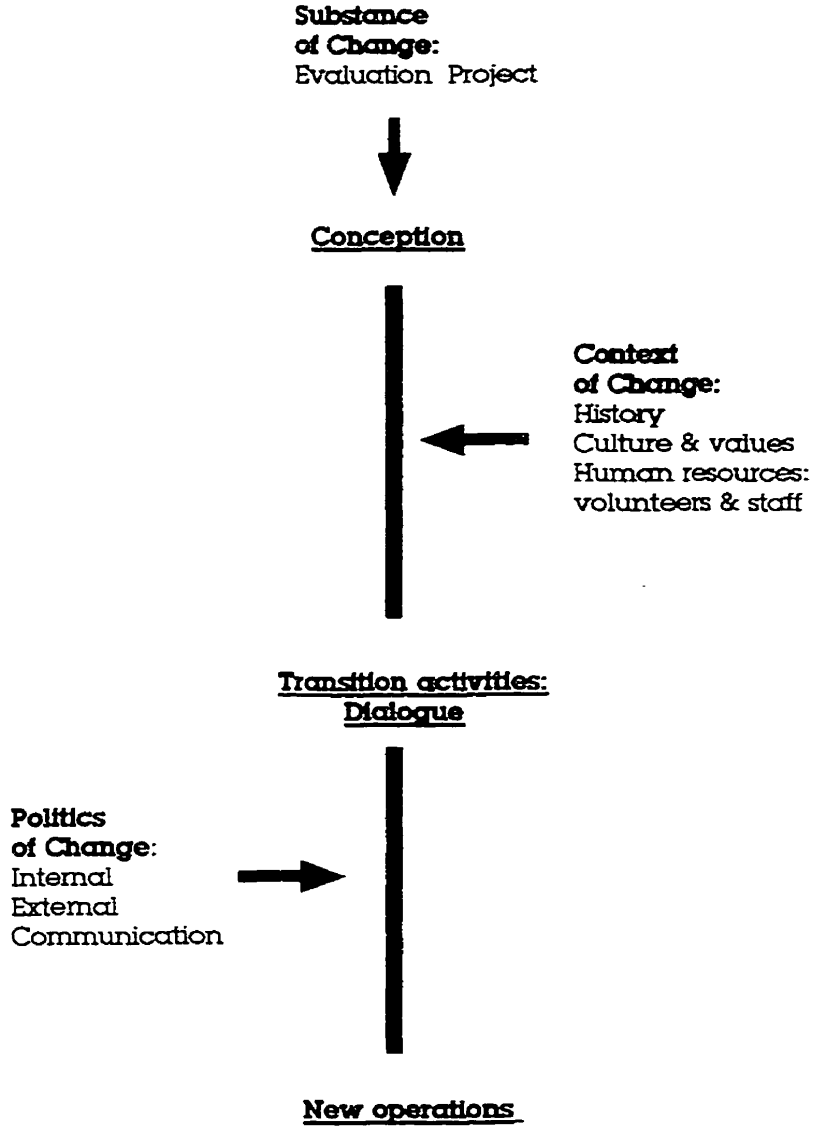
4.1 Introduction

To respond to the question: "How does a volunteer organization teach itself to survive?" the data from the evaluation project was categorized according to Dawson's (1994) conceptual framework (see Figure 1); that is, the context, politics and substance of change. The categories were matched to the research questions; that is, volunteer response to change, volunteer management of change and the role of dialogue during change. This chapter explains how the volunteer organization McGill ILR taught itself about change. The relationship of the data to the preliminary research questions is presented in Table 5.

4.2 The Context of Change

My inquiry into how volunteers responded to change revealed that the majority of McGill ILR volunteers made every effort to respond in a positive manner. In fact, members had experienced and absorbed major changes since the time the organization was founded. Comparing comments from the key informants, the moderators and the members at large, I attributed this positive attitude to the peer-learning culture and values of the organization.

Figure 1
A Processual Framework for Organizational Change



Note. This figure is adapted from Organizational Change: A Processual Approach by P. Dawson (1994), p. 44.

Table 5

The Process of Organizational Change at McGill ILR

Process of change	RQ1: Volunteer response to change	RQ2: Volunteer management of change	RQ3: Role of dialogue in change
Context of change	History, culture & values of organization Member profile	Human resources Financial resources	Atmosphere / climate
Politics of change	Need for change	Internal External	Communication
Substance of change	Conception and funding of evaluation project	Transition activities, recommendations Operation of new arrangements	Data gathering instruments: focus groups, interviews, surveys

Note. The dynamics of change listed in columns 1, 2 and 3 are illustrated in Figure 1 and refer to Dawson's (1994) conceptual framework.

A member's comment from the survey is indicative of McGill ILR's cultures and values:

"The idea of learning in retirement is an excellent one and the organisers of MSLR should be congratulated. In addition to keeping retirees mentally active the program also enables people to meet, to exchange views and ideas, to stimulate and expand interests which one may not have had time to pursue over the years. It also provides a goal to attend classes, meet people and learn new things."

Exceptions to this positive attitude arose as a direct result of the evaluation project: the first was that several councillors, who were also moderators, vehemently resisted the idea of evaluating study groups. Previously during the focus groups, a former chair of the curriculum committee had reflected:

> *"I've struggled seriously with the philosophy of evaluation, because we are all volunteers, very few of us are professional teaching people. ..groups dissolve simply by attrition because they are inadequate....How are you going to tell somebody who's worked terribly hard to structure a group, you don't do this or that, you're dealing with silver-haired people, they're not prepared to be threatened."*

The second exception was resistance to hiring paid staff to work amidst volunteers. A former president explained the desire to remain "just volunteers":

> *"The worst thing that can happen is to allow it [the Institute] to get so big that it has to hire staff. ... You can hire staff to do mundane jobs but you shouldn't hire staff in an organization such as ours to be involved in the management. We've got our good nucleus of people through Continuing Education. The day to day operation should be in the hands of the members, just volunteers."*

Both changes were suggested by Continuing Education, but were later recognized as necessary and approved in Council. The awareness of the need for the first arose arose spontaneously during the moderator focus groups and was confirmed by 70 per cent of respondents to the Member Survey (Dressler, 1995). The awareness of the need for the second became indisputable with the early retirement of the Administrative Director who served as liaison between the Institute and the Centre.

The internal conflict these two incidents provoked was comprehensible considering volunteers' strong sense of the culture they had formed themselves.

4.2.1 McGill ILR Culture and Values

Culture is more than shared attitudes and customs; it is the reflected values, practices and assumptions within which the members of the organization operate. The values of a volunteer organization define its purpose and its criteria for quality and efficiency (Lenaghan, 1991/2). Peer learning values are reinforced at MILR in the following ways: there are no admission requirements, no entrance exams, no prerequisite diplomas that might inhibit older adults from joining. The members' attitude is that life experience is equivalent to a degree and everyone is welcome to participate. There is no criterion to be fully retired, members need only be free during the day. Though no age is specified, many people assumed members had to have reached the conventional age of retirement before joining which in Canada is 65 years.

In the survey and focus groups, members spoke about MILR as a "life-saver"-- especially for those who felt alone or depressed when widowed or retired from busy jobs. They said the combination of intellectual and social activities stimulated their senses and helped fight boredom and loneliness. Those who volunteered for roles within the organization employed their skills which resulted in a renewed sense of self-worth and belonging. When interviewed,

one councillor spoke about the enjoyment of being being part of a successful team-- that volunteering had nothing to do with altruism and giving back to society. Another moderator reflected upon a new life:

> *"It has been the greatest experience of my retirement. I don't know what my retirement would have been without MILR. From a very active life, I found nothing. All of a sudden I came here and I made friends and I became interested. It has been a big part of my new life."*

The values of MILR volunteers are expressed by the immense popularity of study groups offered in the humanities, such as art, literature, music, history and creative writing and the dearth of subjects in the sciences. Six popular areas of study indicate that MILR volunteers have an abiding interest in discovering more about their place in the world (shown in Table 6). The differences between women and men are illustrated by their study group preferences.

Table 6
Study Group Topic Preferences by Gender

Subject	% Women	% Men
Literature	35	19
Music	27	19
History	25	53
Art	23	7
Writing / Communication	21	20
Current Events	22	39

Note: This data is selected from the Member Survey, Table 13 (Dressler, 1995). The question was:What three subject areas do you most want to be available?

The influence of MILR culture on volunteer attitudes was never underestimated by the Planning Committee. It proceeded carefully when designing and implementing the evaluation project and patiently reassured volunteers who were apprehensive that organizational values might change.

4.2.2 A Profile of McGill ILR Members

Demographic information had never been documented and therefore a profile of McGill ILR members was produced for the evaluation project. As a peer learning organization, the Institute's policy was not to request information about an individual's age, education or income when s/he joined. The data in Table 7 shows that seniors who belong to MILR are on the whole well-educated, relatively affluent members of Montreal's anglophone community.

I sketched the following profile of MILR members as being predominantly: women; between the ages of 61 and 75; holding a college or higher level of education; from professional or managerial backgrounds; English-speaking Canadians; earning household incomes over $30,000; living within a half hour travel time of McGill. Half of the survey respondents also reported that they left Montreal for an extended period of time, mostly during the winter months.

Table 7

Profile of McGill ILR Members

Gender	**% (rounded)**
Members	
Women	74
Men	26
Moderators	
Women	43
Men	57
Age	**%**
under 55	3
56-65	23
66-75	59
76-85	14
over 85	1
Marital status	**%**
Married	59
Spouse also a member	20
Live alone	46
Education level	**%**
Secondary school	16
College/vocational	20
University/professional	44
Graduate studies	20
Mother Tongue	**%**
English	76
French	7
Other	17

Mother Tongue	**%**
Language Most Often Used	
English	93
French	6
Nationality	**%**
Born in Canada	65
Arrived in Canada	
Before 1940	20
In the 40's & 50's	56
In the 60's & 70's	20
In the 80's & 90's	4
Household income	**%**
Less than $15,000	6
$15,000-$30,000	23
Above $30,000 (maximum amount)	71
Principal occupation	**%**
Executive/ Professional	59
Managerial/Sales	13
Secretarial/Clerical	17
Homemaker	8
Other	3

Note. The data is compiled from the Member Survey Report (Dressler, 1995) and the Report from MILR Records (Clark & Walker, 1995).

It is worth noting that in spite of the fact that MILR does not discriminate about the backgrounds of its members, it has attracted a population with little racial and/or social diversity especially given the multi-cultural nature of the city of Montreal. A member

commented on the survey:

"As a French-speaking person, I don't feel very much at ease or welcome– I feel like a stranger in paradise."

Another member mentioned a common attitude around the organization that peer values meant members should not be ranked:

"Some of the questions reek of snobbism– education level and income level have nothing to do with MILR."

The lack of outreach to larger communities was becoming a difficult issue for many ILRs. The data from the ILR study (Bynum & Seaman,1993, p.16) indicated similar clientele to MILR: 61% were female; 66% were married; 31% were college graduates and 40% post college; ethnicity was 99% white.

4.2.3 Human Resources: Volunteers

To respond to the question of how volunteers managed change within the context of the evaluation project, I was able to corroborate that councillors and members agreed McGill ILR's most valuable resource was its reservoir of skilled individuals. Members in general supported the efforts of councillors:

"I admire and congratulate the concept and those who implemented it and continue to show leadership. Keep it up!"

Time and effort are valuable resources that volunteers offer and MILR would not exist without volunteer labour. The issue became whether it could continue to run its increasingly complex

operations or would have to rely more heavily upon Continuing Education's support staff. The member survey (Appendix C) indicated 10 per cent of the membership were active volunteers on committees or helping with administrative tasks. Out of a total of 315 respondents, 69 responded that they performed the types of volunteer work shown in Table 8.

Table 8
Types of Volunteer Work

Type of work	Number	% (Rounded)
Member of Committee	27	39
Worked at registration	33	48
Wrote for newsletter	10	15
Assisted moderator	12	17
Worked on special events	13	19
Helped with mailings	13	19
Other	3	4
Total	111	

Note. This data is from the Member Survey, Table 29 (Dressler, 1995). The total of the types of volunteer work performed is higher than 69 because members engaged in more than one type of work.

In addition, 21 respondents stated they have been or are currently members of Council. The number of hours worked by the 69 volunteers during the previous 12 months is shown in Table 9.

Table 9

Hours Spent Performing Volunteer Work

Number of Volunteers	Hours Spent	%
46	8 or less	67
13	9 - 40	19
10	more than 40	14

Note. This data is from page 33 of the report by Dressler (1995).

From this data, I determined three categories of MILR volunteers (shown in Table 10).

Table 10

Categories of McGill ILR Volunteers

Category	No. of Volunteers
Regular volunteers	69
Core volunteers	21 to 27
Inner core volunteers	10

Note. The terms core and inner core volunteers are my own.

What the Planning Committee and leaders sensed was confirmed by the data collected during the evaluation project: McGill ILR was able to survive with part-time volunteers due to the exceptional motivation and commitment of an inner core of volunteers who maintained continuity.

Many core and inner core volunteers described volunteering at McGill ILR as time spent: attending committee meetings; doing the required tasks for the specific role; getting the necessary information; communicating with associates; contributing to the group; understanding committee goals and ways of achieving them; fulfilling social responsibilities; in addition to participating in study groups. They also mentioned the time it takes to come to an understanding of their relationship with other members.

It is important to note that regardless of the time spent, each and every key informant mentioned volunteering was worth the effort and that the benefits far outweighed any costs. They were enthusiastic about: time spent in gratifying work with interesting people, a renewed sense of purpose and a widening of their circle of acquaintances; the majority did not complain about the amount of time it took to fulfill their roles:

> *"The benefits are extensive—filling in pleasant time as opposed to being bored and depressed....I put in a great deal of time. It's been the most pleasant type of work I've ever done in terms of collaboration and cooperation and seeing the immediate outcome of what you do."*

The weakness, from an organizational perspective, was that despite volunteer willingness to give McGill ILR a great deal of their time, it was simply part-time. Pearce's (1993) study of the organizational behaviour of unpaid workers found volunteers regarded the hours they worked a month as a spare time "leisure activity." At MILR this attitude was evident among regular volunteers whose tasks were divided into manageable pieces. These

patterns of part-time activity created the need for a coordinator and members were uncertain whether a volunteer would want to fill the position.

Key informants agreed coordination in the office was weak. Council had responded to this need by designating a volunteer coordinator whose role was to enlist volunteers to help either in the office, at registration, a special event or a bulk mailing. Though a large pool of potential volunteers existed, volunteer scheduling was problematic mainly because it was too demanding on a part-time basis. The strain was felt by core volunteers who knew more time was needed to train recruits. A councillor commented about the problem of attracting volunteers to run the office:

> *"A lot of the work is being done by very few people. You can't expect people to do that. It's a lot easier to get a moderator, because there is a certain ego attached to being a moderator, there's something you're performing and you're getting recognition.... We have to get more people involved in the various administrative functions."*

In the context of change, it is worth reiterating that MILR volunteers were used to being self-reliant and some feared hiring paid staff would change the established patterns of interaction as well as being a strain on financial resources. Many spoke to me about their experiences in hierarchical competitive work environments where salaries ranked employees. The general fear was that ranking might disturb MILR's peer values.

Fortunately, continuity in the office was maintained by two devoted volunteers who performed the daily reception and

secretarial tasks on their own initiative. The registrar, a founding member, opened and closed the office; made coffee, responded to queries and took care of the business that arose-- all with good humour. She was known as the unofficial "ombudsman" and had done this work since the organization was founded. The recording secretary on Council did extra work for committee chairs in her home though they were expected to do their own clerical work. The key informants all marvelled at both women's devotion, but were unaware of the actual hours they put in.

The issue that was beginning to cause a division of opinion among McGill ILR volunteers was whether or not the organization could continue to manage on a "volunteer only" basis without hiring paid staff. This was also a concern in many ILRs in the Network (Hollenbach, 1994; Elderhostel Institute Network, 1994).

4.2.4 Human Resources: University Staff

In the ILR system, the host institution provides space on campus and the services of an administrator or faculty member. The survey conducted by Moskow-McKenzie and Manheimer (1993a) found that the majority of seniors' learning programs were initiated by the host institution in response to a perception of community need or in response to requests from seniors; only a few were instigated by older adults. In contrast, the McGill ILR was a collaborative inspiration between the Centre's Administrative Director and a few seniors who were enrolled in Continuing Education evening courses.

McGill ILR has benefited from the professional services provided by the Centre's staff, such as secretarial and accounting assistance. It also has access to university personnel: printers, caterers, computer consultants, librarians, mail room and building services. A founding member explained:

> *"The Institute has extended beyond our fondest dreams... McGill and Cont Ed have been more than helpful and generous... we have benefited from a lot of hours of work from Cont Ed which we have not nearly paid for enough."*

The reference was to the wise counsel MILR received from the Administrative Director who since 1984 helped volunteers navigate the "corridors of power" at the university. She said that working with MILR was the most satisfying part of her job and she contributed many extra hours voluntarily. A councillor commented that her expertise had helped the peer learning culture of volunteers integrate favourably within the professional academic culture:

> *"The congruence of the so-to-speak amateur functions of the Council with the professional expertise of McGill University worked, I thought, quite well. I hope that it continues."*

4.2.5 Financial Resources

The Institute collects and disburses registration fees from its members: $40 per term between 1989 and 1993; $51 in 1994 and $55 in 1995 which includes library borrowing privileges. All transactions go through the Centre cashier's office. One third of the income is paid to McGill for administrative services, rent and

library fees. The Institute pays for additional university services such as printing, photocopying and mailing. All cheques go through McGill accounting. Special events are expected to generate income to cover expenses.

With an annual budget of approximately $50,000, MILR's financial picture is stable and this is directly attributable to its use of volunteer workers which is almost taken for granted. When asked about the provision of funds, the treasurer said:

> *"We worked out the budget and it's fine. We're very much in the black, because of the grants we received."*

Over the years, the Institute has accumulated a surplus of over $30,000 built from an initial start-up fund from McGill.

4.2.6 Atmosphere

To respond to my question about the role of dialogue in the change process I recorded what members said about the atmosphere and climate of their organization. Some commented that MILR appeared to be a privileged private college or social club. One advantage was that this atmosphere was conducive to open discussion and peer participation. A moderator elaborated during the focus groups:

> *"What is nice and lovely about MILR is it's somewhat like an Oxford lecture hall....This is a very special selection of people, who volunteer to come to try to get into MILR. It's a self-sifting thing, and they are*

actually people who are alive between the ears and who don't want to be treated like school children."

The Institute provides a university milieu that links older adults who have a common desire for intellectual challenges. Being housed at McGill gives this seniors' organization a distinctively academic atmosphere that differs from others in Montreal. One key informant remarked about this special significance:

"There is a cachet about McGill that attracts people to MSLR. If we were a community-based organization, it would not be the same."

Most of all, volunteers valued the Institute's spirit of cooperation and consideration; nobody wanting personal gain at someone else's expense. Key informants commented that the collaboration and goodwill among volunteers contrasted sharply with their past work environments. There was an evident sense of self-satisfaction that problems had been resolved effectively with a minimum amount of fuss and volunteers were reluctant to say there was a need for improvement. An inner core volunteer had the following point of view:

"I don't see how we could change it or improve it. It's a marvellous Institute and it's running so smoothly and everybody seems to be so happy and content to be with us."

Though some members spoke about a few study groups being cliquish and a few moderators being on "ego trips", there was adequate support data from the interviews and focus groups to believe that on the whole the change event was conducted in the spirit of dialogue described by Bohm and Peat (1987) and Isaacs

(1993).

4.3 The Politics of Change

To find out how this volunteer organization managed change, I had to learn the distinctions between internal and external politics; that is, the areas of the Institute's authority and the areas of the Centre's authority. The politics were determined by the ILR structure of governance. Internally, activities are planned and administered by volunteer-members and policy decisions are made in Council. Externally, the Institute must respect the policies and regulations of its 'host' or sponsoring university. Interestingly, the awareness of the need for change seemed to arise simultaneously from both partners though for different reasons.

4.3.1 Need for Change

Internally volunteer response to the need for change was diverse. Volunteers themselves knew they could not be expected to continue their same level of commitment; some started volunteering when the Institute was founded. A former Council member reminded the interviewers:

> *"We recycle alot of our people. We've been in business five years so that most are over 65 or in their 70s. In five years, attrition is going to take place. What we have to do is get more new people, younger people; encourage them to take on jobs on committees, to do alot of the administrative work."*

General members were also aware of other weaknesses and mentioned the following in the survey: unclear overall policy, lack of input by members, lack of preparation for new volunteers and insufficient integration into campus life.

External circumstances were less concrete. On one level, the Centre's climate of uncertainty contrasted sharply with the Institute's relaxed climate. McGill was reacting to drastic government funding cuts and some leaders sensed there would be additional pressure for MILR to be perceived as "paying its own way." When asked to clarify the situation, the Dean of Continuing Education said:

> *"Among the situations I inherited is a very tight budget, therefore I've got to spend more time looking at individual departments, evaluating programs which should be continued and those which should be scratched. MILR is towards the latter part, not through any lack of interest, but for my priorities..."*

The vagueness of these uncertainties made volunteers aware that change was inevitable; some responded to these challenges and initiated the evaluation of the organization to study the issues while others tried to evade decision making.

4.3.2 Internal: Council and Committees

How volunteers managed change stemmed from MILR's internal politics. For one thing, volunteers did not relish the tag "manager" and avoided using it. They had worked to establish a non-

hierarchical relaxed environment in which every member was equal. The peer approach to governance believed that organizational change need not be "managed" prescriptively and every volunteer's contribution was valuable.

The McGill ILR Council has fifteen members: 12 are elected, 2 are appointed and the Past President sits ex-officio. Meetings are held monthly at which time the chairs of the standing committees share progress reports. The By-laws state that an annual general meeting must be held "for the evaluation of the year's activities and for election of officers and Council members." In the revised By-laws, approved in November 1996, each member of Council has a designated responsibility as a committee chair: Curriculum, Communications, Newsletter, Planning, Special Events and Volunteer Coordinator. The positions of Treasurer and Finance Chair were combined on a trial basis for one term of office because of the latter's poor health (Council Minutes of May 11, 1994). This was extended until a Finance Chair was nominated for 1997/8 so that in effect no attention was given to financial planning for two years.

The president felt it was a problem that "No provision was made for a standing committee of a planning sort which the SIP committee turned itself into" (Rafman, 1995b). The seat for the Chair of the Long-Range Planning Committee lapsed in 1991. The SIP Planning Committee chair had attended Council as an ex-officio member to make reports to Council on the progress of the evaluation.

The stipulation in the By-laws that officers have "backups" was ignored by volunteers. Their denial of this policy contradicted a general awareness that an organization led by volunteers in their age group was extremely vulnerable. One councillor mused about this stubborn attitude:

> *"No backup. I'm guilty of the same thing. I called the committee to meet but I did most of the work. Whether that was an ego trip or my inefficiency, I don't know, but no committee and no job should be dependent upon any one person, particularly not in our age group and not considering the philosophy of the Institute– it's peer."*

At the time of the project, there were no reference guidebooks nor job descriptions for incoming committee chairs. In general councillors and committee members worked according to their own initiatives without external input. A certain inertia surrounded the training and recruiting of successors or replacements though incoming volunteers told me they had made tentative requests for training opportunities. Generally volunteers resisted a supervisory or teaching role and many felt it inappropriate. MILR was underutilising its human resource of volunteers as one chair stated:

> *"More could always be done... A new person has come to Council for the coordination of volunteers, I'm glad to see that step in the right direction."*

Nevertheless, when interviewed the key informants agreed that "on the whole" the Institute functioned remarkably well and that the administrative systems ran smoothly and efficiently. Most said problems were minimal and that they were resolved internally in a satisfactory and amicable fashion, even though the process took

longer than necessary. There was an underlying confidence that qualified members would continue to come forward. If not, or if someone unsuitable was selected, MILR had the assurance that the staff from Continuing Education would step in.

Everyone mentioned her or his personal enjoyment as part of a group who supported each other and who didn't let personalities interfere though some resisted group process and preferred to function independently. One such committee chair stated:

> *"...in some cases I did have [support] and in some cases I didn't. I was operating as an autonomous group and I didn't take into account that I was part of an organization. I would arrogantly say: 'This is the way I would like it to be.' And Council would say, 'But no.' I didn't like it..."*

Some found group decision-making cumbersome, especially since presidents and vice-presidents changed every year and councillors every two. Group process within an academic milieu was foreign to retirees from private business who were frustrated with "decisions by committee" and overly long discussions on every issue. The general solution was to let time, not human intervention, resolve issues. This made individuals uncomfortable taking authority; Council meetings often had 15 people discussing what concerned only two and broader issues got side-tracked. One councillor commented:

> *"I think it's important that Council know where it's going, that Council define what it's objectives are and that Council look at the big picture and empower its members to look after the details..."*

This vision, however, proved difficult to put into action. In general, MILR's presidents supervised change; they did not initiate it; for instance, one supervised the move to the new premises; another a revision of the By-laws and another the implementation of the SIP project recommendations. It is worth noting that moderators filled about half the positions on Council during the evaluation. The four presidents during the evaluation project were also active moderators who participated in the focus groups, the interviews and the survey. The fourth president's intention to empower committee chairs to assume greater responsibility and initiative was relatively successful in some instances, such as the Communications, Newsletter and Planning Committees. It is to be seen whether the succeeding president will continue to prioritize this vision.

4.3.3 External: McGill Centre for Continuing Education

An important factor in the politics of change is that MILR does not operate alone but in consultation with the Centre for Continuing Education. The evaluation project made the nature of this relationship somewhat clearer for volunteers. Some leaders thought that McGill was not prominent enough and one president's message in the Newsletter (September 1994) stated that the Institute's acronym would become McGill ILR, instead of MILR. In the same edition, the Administrative Director wrote an editorial entitled *"The M Stands for McGill"* to discuss the university's "high

regard for doing things the collegial way."

McGill ILR's stable internal politics were directly related to its healthy financial status. The Institute collects and disburses its own membership fees and the Centre processes the transactions through the university's central accounting system. The Institute pays about one third of its revenues for these administrative services to the university; rent, library fees and services such as printing and postage are additional costs. Volunteers required the guidance of Centre staff when forecasting the annual budget, the form of which was designed by the Centre. University accounting systems proved frustrating for some retirees from the private sector. A former treasurer's advice was:

> *"The early problems for anybody starting up would be to know what the university does because no matter what you've done in business, it will never conform to what a university does. You have to learn the system. You have to go with their system, then things work out."*

Although this monetary arrangement is convenient, it determines the Institute's dependence upon the university. McGill ILR operates a relatively large operation on a relatively small budget and most councillors understood this would be difficult to achieve just with volunteers and outside the umbrella of the university.

The Centre does not interfere in MILR's internal politics and aside from expecting to see the budget and an annual report it sees itself as:

> *"... the sponsoring partner, providing the resources which enable this*

community [MSLR] to continue to build on knowledge accumulated over many years, in a setting appropriate to their previous education and experience."

This image of partnership is viewed a little differently by volunteers. A past president elaborated that the ILR/host university relationship was like:

"a wholly owned subsidiary, most of the administrative functions of which are carried out by the parent company, but which itself manages the making of the product and its marketing."

This "subsidiary" relationship affected volunteers' perception and management of change. They felt firmly bound by the By-laws and Operating Rules which state the Centre's responsibility is to ensure the quality of the ILR program and the appropriate level of service for its clientele. Councillors were wary of the proviso in the By-laws which stated: "New activities which represent a significant departure from university procedures have to be submitted to the Centre's Executive Committee for approval." It was cited whenever a controversial change was suggested, especially concerning study group proposals. In fact, nothing has ever been submitted, presumably due to the fact that the Institute functions internally as a censoring and filtering system.

Key informants generally agreed that the benefits of affiliation with McGill far outweighed the costs (Rafman, 1995b) though the nature of this relationship gave some volunteers a slight sense of insecurity. The paradox was that the Centre assisted the volunteers to manage change yet they cannot implement any major change without consulting the Centre. The result was that internal

politics fluctuated in accord with the leaders; that is, between the volunteer-leaders who believed in cultivating closer ties with McGill and the volunteer-leaders who thought university procedure cumbersome and favoured greater autonomy (Rafman, 1995b). Leaders' positions differed on this issue and policy was confusing for general volunteers to follow.

4.3.4 Communication

My study was particularly interested in how volunteers communicated information and how these communications were kept open. Though I found open discussion and a spirit of inquiry present in the different committee meetings and study groups I attended, this practice was not carried over into Council meetings. Most key informants agreed that communication could be improved (Rafman, 1995b). A formality infused Council meetings that produced barriers between individuals and at times there was a sense of pressure and/or disorganization that provoked distrust. My conviction was that part-time volunteers needed stronger lines of communication to enable them to be effective workers (Pearce, 1993); I looked for answers to how this situation had arisen. Many key informants in their interviews had perceived this gap in communications and one member expressed it this way in the survey:

> *"There is too much of a barrier between Council and/or committees and the membership at large. Recruitment to the Council and to the committees is not effective; i.e., the nominating process is not optimal."*

Volunteers expressed frustration to me that information was

not fed back to them through their committees or through official networks. One response to the survey question "Are you kept adequately informed of activities?" provided another insight into a reason for the information gap:

> *"I realized last week that there were notices floating around on windowsills for us to read."*

There was a lack of attention to communicating vital information. The president or vice-president attended all meetings yet they considered themselves more as observers than as advisors who were there to harmonize decisions with Institute policy. A few key informants stated that coordination between committees outside of Council meetings was not carried out in any methodical way.

Volunteers professed ignorance of Council procedure and although meetings were open to all members no one ventured to attend. Internal communication about Council decisions was limited to bulletins in the quarterly Newsletter. One member criticized the financial statement in the November 1994 Newsletter :

> *"Never before have I seen a financial report that contained not a single figure! Since the Institute is now a self-supporting body operated entirely by volunteers, would it not be fitting for all subscribing members to receive periodic statements of income and expenditure."*

The problem in communication seemed to be a consequence of volunteers being used to working independently and this habit affected the transmission of information. This proved true during the evaluation project-- Planning Committee reports were not

circulated outside of Council although the findings concerned everyone. This limited the impact of the evaluation within the organization though councillors attributed this to members' "usual" lack of interest in governance.

Communication was sometimes hampered by volunteers who searched out positions of authority to prove to themselves that they could do the job. Once elected, these individuals preferred to learn the job autonomously. One chair confessed about the need to do it alone:

> *"It had nothing to do with any social conscience or anything else. I wondered if I could do it and maybe that was arrogant on my part or maybe alot of nerve because supposing I had failed? That worried me because my self-image isn't that huge, but fortunately it worked."*

Councillors thought this tendency to work independently did not affect organizational function; yet it did cause confusion when there was an inadequate transfer of information. Many councillors were unaware how their peers really felt regarding important issues such as whether or not to promote growth and how to attract potential volunteers. To improve this situation, the fourth president invited Council members to meet informally for lunch before each monthly meeting.

In spite of councillors' recognition that volunteer organizations were fragile organisms, the inclination was not to disrupt the way things were. Nevertheless, an awareness for change did develop. Key informants realized communications had to improve to enable volunteers to be prepared to step in if somebody "stepped

out." A response to the complaint there was little communication between Council and the general membership led to the posting of a notice to announce Council meetings and Minutes were placed in the office for reference. A different kind of communication problem was that this independent and self-directed population did not relish asking for assistance. They had survived the world wars and the depression and honoured each other's privacy and self-reliance. Many were also well-educated professionals who respected another's expertise in her or his speciality and considered instruction unnecessary. Mostly they minded their business and did not want to be misperceived as interfering.

External communications were handled by the Communications Committee who sent out press releases to recruit potential members. More could be done to attract members, but without a firm indication from Council whether or not to increase membership, there was no increase in public relations and promotion activity. This reluctance to formulate a policy for growth diminished volunteer initiative and motivation.

4.4 The Substance of Change

Substance means the characteristics, activities and the scale of organizational change. MILR's self-evaluation project was intended to provide leaders with information about organizational strengths and weaknesses and to involve the whole organization. Yet as Dawson (1994) noted, the substance of change may at times

enable and at other times constrain leaders ability to respond and to act. The fluctuations in response were similar at McGill ILR.

4.4.1 Conception and Funding of the Evaluation Project

With the awareness of the need for change, volunteer-leaders responded by conceiving and designing a self-evaluation project. These volunteers and staff were identified with the project and the organization expected them to maintain its direction and consistency. Dawson (1994) names these individuals 'champions of change.' The principal idea that MILR should create an environment to sustain volunteer efforts was reiterated in the grant application to Health Canada (Clark, F., 1990):

> *"Lessons from experience indicate program management structures must be developed that are both compatible with the volunteer nature of the organization and at the same time capable of generating the resources required for them to survive. Evaluation plays a crucial role in this process."*

The substantial funds awarded were adequate to fund the preparation of the data collection instruments, professional fees, the Guidebook and expenses to host a conference for other seniors organizations.

The evaluation was introduced into the volunteers' busy schedules and the majority willingly took time to participate in the interviews, focus groups and survey. Many appreciated the

opportunity to express their points of view. On the other side, some distrusted self-disclosure and felt threatened by critical intervention. Some considered it "navel-gazing." A founding member stated:

> *"The Institute is so beautifully balanced between the learning, the social end of it and the effort the people put into it.... Like a beautiful flower, if you put too much fertiliser on it, it dies."*

The general membership showed less interest in participating than volunteers-- just under 50 per cent responded to the survey.

4.4.2 Transition Activities

The most challenging aspect for volunteers and staff alike was the transition into decision-making activities, such as determining the Terms of Reference and the content of the data gathering instruments as outlined in the Evaluation Framework (Lusthaus et al., 1995). Dawson (1994) says:

> *"Managing transitions is about managing an unfolding, non-linear, dynamic process in which players and actions are never clearly defined." (p.165)*

Internally, the inquiries and activities stirred up opinions, feelings and ideas that reverberated throughout the Institute and it is to the credit of the SIP Planning Committee that the project did not disintegrate. The project was administered by the volunteers and the supervision of the budget and timetable were handled by the Administrative Director. This fruitful combination of volunteer

resourcefulness and professional expertise contributed to the successful completion of the project and the collaboration continued thereafter.

During the transition, the supervisory role of the Administrative Director was more sensitive. As the Centre's representative she was advising volunteers to plan for self-sustainability while ensuring the organization did not drift away completely. The Planning Committee took the opportunity to clarify what the Centre expected from the Institute, especially regarding academic standards and the evaluation of study groups. The Dean of Continuing Education responded:

> *"I can't impose standards, the university can't impose standards on MILR. It's going to have to be the MILR members who impose their own standards and the only thing we can do is offer some sort of guidelines in the sense of what is acceptable, what is not acceptable."*

This controversial recommendation to evaluate study groups (McGill Institute for Learning in Retirement Planning Committee, 1995) caused dissension among councillors. There were uncertainties among volunteers about whether McGill had the authority to appraise MILR's academic standards. Course evaluations were standard university policy and the suggestion had been made that MILR find some mechanism of evaluation that would satisfy its clientele. Volunteers argued that moderators were not professional teachers and should therefore not be subject to evaluation. Some who were retired teachers had unfavourable memories of previous evaluation processes. In spite of vehement opposition, the decision was made to proceed based on data from the Member Survey-- 70

per cent of respondents thought study groups should be evaluated (Dressler, 1995).

The transition period signalled an intense period of discussion among volunteers and members that resembled dialogue process: the focus groups, consultations, interviews and surveys stimulated simultaneous bursts of creative inquiry that I witnessed taking place in a variety of committee meetings.

4.4.3 Dialogue through Data Gathering Instruments

The spirit of dialogue was contained within the data gathering instruments. There were open-ended questions in the focus groups, interviews and two surveys to allow members and former members to express themselves. However, the key informant protocol did not ask interviewees to explain what they did in their own terms (Appendix B) so that the findings gathered during the one-on-one interviews were constrained by the omissions. Close-ended survey questions have limitations that are not evident in nondirective group interviews (Krueger, 1991). The moderator focus groups on the other hand allowed for "employee listening" (Bischoff, 1989) and were more successful in identifying problems in volunteer relations and obtaining insights from individuals.

The committee members received professional guidance on the theory and fundamentals of educational research (Anderson, 1990) and models that enabled them to design the data collection

instruments (Appendices A to D). The advantages and frustrations of this collaboration were described by a Planning Committee member in the Guidebook (Lusthaus et al., 1995):

> *"At first some of us found climbing the TOR [terms of reference] (a high, craggy hill says the dictionary) and developing the key questions a bother, and too great an investment of time. But later, when we needed to shape questions for surveys, focus groups, and key informants, the TOR became useful. And again they were useful in helping us structure the final report." (p.12)*

The instruments were well-designed by the Planning Committee to involve many voices of the volunteers. The data were treated as confidential, but were not completely anonymous. Perhaps this accounted for the omission of a question on what members thought about volunteer administration and leadership, the assumption being that McGill ILR was founded to be run by volunteers and would continue as such.

4.5 Conclusion

This chapter presented the data gathered during the evaluation project and discussed the issues encountered by this volunteer-run organization. At the close of my study, the process of change was continuing at McGill ILR. The Planning Committee's findings and recommendations (McGill Institute for Learning in Retirement Planning Committee, 1995) emerged from the transition activities and formed the basis for implementing new operational procedures which fall outside the scope of this study.

An external evaluator, Dean of Harvard Continuing Education, was invited to review the Planning Committee's procedures and speak to leaders of McGill ILR. He spoke about the Institute moving into a second phase of growth; he believed that there would be a greater need for continuity and thought permanent administrative staff might be required. He stressed the necessity of discussing where McGill ILR would like to be in 10 years and developing a communal vision to meet objectives (McGill Institute for Learning in Retirement Council Minutes of February 24, 1995).

Organizations, like people, need a rest from self-examination and after two years McGill ILR volunteers spontaneously determined they had had enough. Little interest was shown when the Special Events Committee sent out an announcement for a one-day retreat to brainstorm issues and develop the ideas that had arisen during the project. The retreat was postponed for a year and the cycle of change that began with the conception of the evaluation project in October 1993 was closed in June 1996.

Chapter Five
Concluding Discussion

5.1 Introduction

This thesis responded to shortcomings unearthed in the literature and the research on volunteer organizations. This study offers a timely and much-needed approach toward a richer praxis of studying change in volunteer-run organizations. Chapter Five presents the conclusions of my study and a summary of the characteristics of an Institute for Learning in Retirement that support or hinder change and explores some avenues for future study.

5.2 Study Conclusions

An important conclusion of this study is that change is not threatening to volunteers when their experience and skills are utilized appropriately and when their skills are perceived to improve the organizational culture. A second conclusion is that a change event, such as the evaluation project, is enhanced when there is a spirit of dialogue that encourages volunteers to speak out about their organization. Both conclusions support the idea that the characteristics of an ILR help volunteers to absorb change.

As they went through the evaluation process McGill ILR

volunteers taught themselves how to absorb change effectively. Most of all, the evaluation process created a framework to implement necessary changes. Table 11 summarizes how volunteers responded to change and how McGill ILR managed change in a spirit of dialogue.

5.2.1 Volunteerism and Volunteer Organizations

My overall observation was that the peer culture of an ILR attracted seniors who are self-directed learners who in turn provide the organization with a reserve of volunteers to administer the program. The context and politics of an ILR also support volunteers' healthy response to change: (a) a congenial peer learning environment; (b) opportunities to employ seniors' skills and experiences and to learn new skills; (c) a flexible system of self-governance and (d) the professional collaboration with the host university. These characteristics had sustained McGill ILR since it was founded and had helped members to overcome the complexities and paradoxes inherent in running a volunteer organization that hindered their ability to absorb change, such as: short-term leadership, lack of continuity, a part-time leisure attitude to work and limited training (shown in Table 12).

Table 11
Response to Preliminary Research Questions

Research question	Response
RQ1: How do volunteers respond to an apparent need for change?	Volunteers responded to the need for change in several ways: (a) "Champions of change" were challenged and initiated an evaluation project to gather information, then acted accordingly. (b) "Participants of change" interested in improving the quality of organizational life became involved. (c) "Opponents of change" preferred to embrace the the status quo and remained in opposition to some initiatives of the 'champions.' (d) "Unaware of change" did not participate.
RQ2: How does a volunteer-led organization manage change?	(a) A volunteer-led organization prefers not to "manage" but to consolidate change into its organizational life. (b) The self-evaluation project provided the mechanism to let volunteers discover how history, culture and values and politics influence change. (c) Internal politics: Organization stimulates rather than exploits volunteer resources; secures special project funding rather than strain financial resources. (d) External politics: Volunteers consult professionals and advisors and collaborate on methods to gather and analyze information.
RQ3: Is the spirit of dialogue present in the change process?	The spirit of dialogue was present when: (a) the atmosphere was conducive to open discussion and listening; e.g., committee meetings, focus groups, interviews, consultations and retreats; (b) findings and recommendations for change were communicated throughout the organization and to other seniors organizations. The spirit of dialogue was absent when: (a) personal authority appeared to br threatened; (b) volunteers kept silent or did not care to participate.

Table 12

Summary of ILR Characteristics that Support or Hinder Change

ILR Characteristics	Support Change	Hinder Change
	CONTEXT OF CHANGE	
(a) Culture:	Self-directed learners	Aging membership
Peer learning	Sense of ownership	Little outreach to wider
in retirement	Community of peers	community
	Democratic values	Exclusivity, cliquishness
	Camaraderie	Lack of cultural diversity
	Relaxed environment	Comfort with status quo
	Interest in organizational	Fear of change in
	evolution	organizational values
(b) Human Resources:	Variety of skills	Part-time leisure attitude
Volunteer-members	and work experience	Split tasks / "piecework"
& volunteer leaders	Personal enrichment	Poor communication
	Sense of commitment	Burnout - decreased motivation
	and responsibility	Lack of recognition
	POLITICS OF CHANGE	
(c) Internal Governance:	Self-governance	Time & effort involved
Council & committees	Member-run & member-led	Limited training of recruits
	Shared responsibilities and	No continuous vision
	workload	Short-term fickle leadership
	Autonomous leaders	Time for communal decision-
	Consensus building	making process
(d) External Governance:	Sponsorship/partnership	Accountability
Host university	Quality maintenance	Quality control
	Professional guidance	Bureaucratic procedures
	Back-up staff	Dependence on staff
	Access to services	Cost of services

The analysis of ILR characteristics leads to a better understanding of volunteer leadership.

5.2.2 Volunteer Leadership

Leadership was erratic in this volunteer organization because leaders changed annually and the volunteers did not have adequate time or resources to develop and implement their plans of action. Fortunately, McGill ILR attracted a high quality of core volunteers with management experience and the Centre staff provided continuity. Generally whoever volunteered, served. On the other hand, "You called me!" was a common remark made by key informants. This word of mouth process by which the Nominating Committee solicited candidates was successful in convincing retired executives and professionals to volunteer. Nevertheless no one had ever administered an ILR so that in spite of their diverse management and academic backgrounds, volunteers experienced significant periods of confusion and adjustment when coming into office.

The self-directed learners who provide a vital reserve of volunteers for ILRs are replenished as long as they believe in the values of the organization and want it to continue. At McGill ILR volunteers' personal satisfaction came from sharing leadership with other members. A founding member said:

> *"It's the most pleasant type of work I've ever done in terms of collaboration and cooperation and seeing the immediate outcome of what you do."*

Volunteering in retirement meant leaders were generally over 65 years of age when they joined the organization and everyone was aware that aging affected memory, mobility and energy levels (Neugarten, 1975). Many spoke to me about personal and health concerns which affected their attendance and performance. Leaders worried that an absence or illness could threaten the organization's effectiveness, especially since knowledge of procedures did not circulate and there were no backups. Some felt insecure about jurisdictions or doing their job properly and hence were unwilling to take initiative.

In spite of the pitfalls of part-time volunteer leadership, the organization maintained a certain behavioural continuity, however unintentional, by selecting experienced moderators for leadership roles. Names of "star" moderators often came up in discussions as people who could lead a study group; the belief being that someone who could lead a study group would be suitable on committee. One moderator expressed the qualities of a prospective ILR leader:

> *"The ability to initiate discussion, to listen when somebody wants to say something, to walk the tightrope, to be prepared to impart the knowledge that you had to gain to be a moderator, and at the same time be really able to motivate people to participate."*

Practitioners of process-oriented psychology who study group interaction also observed that leadership is a shared project in which the leader performs:

> *"... a role that no single individual should ever expect to fill sufficiently. Leadership is a group project and all of us are necessary to fill it."*
> *(Mindell ,1993, p.61)*

Shared leadership is not a term in usage at McGill ILR though it is appropriate to explain how the organization functions. Key informants on the whole attributed the successful growth of McGill ILR to the skills and dedication of predecessors-- not to the ILR structure. It is normal for volunteers to pay tribute to their predecessors; that is,

> *"...the devotion of people who have resolved problems very well. It's the people, not the system.... It's not a matter of good fortune: It's the people who originally did the planning, who intuitively did what you [Planning Committee] are trying to do systematically now."*

The new-found general awareness that the Institute relied heavily upon core volunteers and that their energies were limited became a key issue during the evaluation. Because councillors did not delegate and preferred to do the task themselves, a few had established a "privilege of place" that inhibited incoming volunteers and counteracted the peer atmosphere. The stipulation in the By-laws that "No member will serve on more than two committees at the same time and no member may serve on the same committee for more than six years" was overlooked. The paradox was recognized that the Institute needed experienced volunteers to maintain operations and it needed new volunteers to infuse vital energy.

Core volunteers found that the evaluation project kept them busier after retirement than before. Their presence made some people fear the Institute would become dominated by "people who hang on" and that this would curtail the flow of other competent or interested people. Individuals who were parachuted into leadership

positions expressed discomfort about learning on the job without adequate preparation; a past president said it took:

> *"... a good six months or more, just to get the feel of how MILR operates... the committees and how they function and interrelate with one another...*

The key problem of how to introduce new recruits effectively into administration so that their skills can be well utilized was not addressed satisfactorily during the evaluation. Leaders knew MILR would have to develop better ways to resolve this problem in the future:

> *"...potential members come in and stay for awhile and they are very talented and have a lot to contribute and somehow we don't entice them or approach them to try to get them involved."*

Replacing volunteers who are not contributing to the growth and advancement of the McGill ILR remains a sensitive issue; leaders were unwilling to ask other volunteers to train successors.

5.2.3 Change, Learning and Dialogue

Through this study, I discovered that action research methods enable volunteers to teach themselves organizational survival skills. Participation in the self-evaluation project taught volunteers ILR management skills such as: critical inquiry, consensus building, dialogue and shared leadership. The project also offered members the opportunity to learn more about their own capabilities.

It is foolhardy to say that change proceeded according to plan at McGill ILR-- process is never neat and tidy. If the project had become prescriptive or insensitive to volunteers, it would have failed to bring about the substantial improvements that it did.

McGill ILR took a risk introducing a change event, but it learned new ways to involve peers in decision-making activities. In the literature on organizational learning, theoreticians warn that planning groups often get stuck when they present their conclusions to others who have not shared the same journey (Watkins & Marsick, 1993). Predictably, some councillors did not see the Planning Committee's findings quite so clearly nor judge their recommendations quite so compelling, yet the majority of recommendations were accepted and implemented-- some immediately and others incrementally over the following year. The situation that appeared to be unsolvable-- the recommendation to evaluate study groups-- was resolved during a consultation workshop with moderators where I served as scribe.

One reason the recommendations were implemented so easily was due to the careful wording which respected organizational values and beliefs. The formation of a new Long Range Planning Committee was announced with a new chair and eight original members of the SIP Committee (McGill Institute for Learning in Retirement Council Minutes of June 28, 1995). The new committee's future role was discussed and refocused in a subsequent meeting-- Council decided it would be responsible for developing contingency plans if the need ever arose (McGill Institute for Learning in

Retirement Council Minutes of February 29, 1996).

The difficulty for ILRs with part-time volunteers is that organizational learning is fragmented and incomplete. Kim (1993) suggests that workers "codify" their individual learning experiences and reactions to situations to avoid reactive situations in the future. This was done in a fashion at MILR when Planning Committee members transferred their insights, or "mental models", into the guidebook for self-assessment and presented it to international seniors organizations at the Maintaining Momentum Conference. The act of documenting the process consolidated individual learning and contributed to overall organizational learning:

> *"As mental models are made explicit and actively shared, the base of shared meaning in an organization expands, and the organization's capacity for effective coordinated action increases."(Kim, 1993, p.48)*

For Kim language and words are inadequate to describe dynamic phenomena. In comparison, Isaacs (1993) believes that a dialogue model best expresses the truth and resolves conflict. The reasons for committing to a dialogue process vary but it does change and improve relationships:

> *"It is our being together in relationships and in working seriously together at seeing what is preventing 'free flow of meaning' between us, that those relationships can change, not in time but at the time." (S. Bohm, 1994, p.1)*

Though lines of communication were weak between committees as well as between Council and the general membership, the evaluation process created dialogues which produced ripple

effects throughout the organization. Dialogue is not a conventional intervention; it does not isolate a problem then attempt to fix it. The dialogue method makes people aware of their personal points of view and as they suspend their fixed assumptions they gradually learn new modes of collective thinking. I observed volunteers learning to let go of cherished points of view and the outcome was improved communication within and among groups.

In an article on dialogue, collective thinking and organizational learning, Isaacs (1993) describes a dialogue strategy developed from David Bohm. In brief, Bohm compared dialogue to the environment of superconductivity where electrons are cooled. In these cool environments, electrons act like a coherent whole flowing around obstacles without colliding, creating very high energy. As the temperature rises, the electrons scatter into separate parts, losing momentum. Using this analogy, Isaacs compares dialogue to the development of "cool inquiry" into the processes, assumptions and certainties that compose everyday experience.

Isaacs' (1993) conceptual framework resembles McGill ILR's evaluation process as it went through stages of instability and inquiry to produce creativity. Groups often worked at one level of discourse and returned to an earlier level. Different stages occurred simultaneously, such as, instability which resurfaced whenever study group evaluations came up for discussion. Isaacs explains the stages as:

(i) Instability: individuals examine their predispositions toward the organization's beliefs and values;

(ii) Inquiry: individuals learn to pay attention to what others are saying;

(iii) Creativity: a free flow of meaning develops among individuals.

The outcome is a "metalogue" which permits organizations to make collective decisions that benefit the whole enterprise.

Isaacs emphasizes that an organization's procedures must facilitate communication of what has been learned. MILR's procedure was to distribute the thirty recommendations for change to Council and assign responsibility for implementation to the appropriate committee chair (McGill Institute for Learning in Retirement Council Minutes of June 28, 1995). As volunteers listened to how others formed opinions, they were able to formulate collective decisions.

For the purpose of correlation, I simplified McGill ILR's evaluation process into three stages and compared them to Dawson's (1994) processual approach and Isaacs (1993) schema for the evolution of dialogue (shown in Table 13). The analysis of the data from the evaluation illustrated that change and dialogue are similar dynamic processes. To reiterate, a process was initiated when volunteers became aware of a need for change or for dialogue; afterward they engaged in decision-making activities and this transition phase stayed in effect until new organizational systems became operational.

Table 13

Comparison of the Process of Change, of Evaluation and of Dialogue

Dawson's Processual Approach to Organizational Change	McGill ILR's Self Evaluation Process	Isaacs' Evolution of Dialogue
Awareness of need for change, conception of evaluation	Invite volunteer-members to deliberate issues	Instability
Transition activities and decisions	Conduct focus groups, interviews, surveys, consultations	Inquiry
New organizational operations	Present findings to volunteer-members; recommend changes and methods for implementation; distribute information to other ILRs	Creativity

In conclusion, McGill ILR's change process resembled the dialogue process and conversely change generated greater dialogue activity. The initiation of a change project increased volunteers' critical skills to question organizational assumptions and patterns of interaction. These skills would be valuable for developing long-range plans to ensure sustainability. In short, the SIP Evaluation Project furnished volunteers with concrete survival tools for the future.

5.3 Reflections

One important aspect of this study was to provide McGill ILR volunteers with concrete ideas on how to continue a change process that would be fruitful. Leaders knew more could be done to improve the running of the Institute; however, they did not wish to alienate volunteers who considered the evaluation project closed. With this in mind, I developed some guidelines for further dialogue encounters:

- Develop awareness. Develop volunteers' sense of awareness of the organization by planning follow-up consultations and information sessions to review and update the issues stemming from the evaluation project.
- Cultivate balance. Ensure that leaders' visions are in balance with the organization's culture and communal values by scheduling regular strategy meetings.
- Practice patience. Do not rush volunteers-- allow for delays as individuals become familiar with new procedures; extra patience is required during each transition period.
- Accept limitations. Accept the fact that volunteers' motivation has limits; provide job descriptions and offer training sessions to teach requisite skills and provide feedback at regular intervals as reinforcement.

McGill ILR volunteers are distinct from institutional volunteers as they work for themselves. Hence an ILR resembles a private club or a self-selecting community designed especially for

seniors who want to share intellectual and social interests (Sack, 1995). Membership is a form of ownership and this distinguishes ILRs from the volunteer organizations I have known.

For this reason, complementary activities to the study group program would generate greater volunteer involvement and hence greater commitment to MILR's future. The implementation of the following suggestions by members (unpublished comments from the survey) would involve more volunteers in new operations and provide opportunities for them to exercise their intellectual curiosity and creativity: (a) greater involvement in campus activities; (b) computer workshops and laboratories; (c) more interaction with McGill academic staff and (d) exchanges with other local and international seniors organizations which share similar interests. In addition, I prepared four recommendations to improve organizational life with practical ways to implement them as action research projects (Appendix F).

McGill ILR's evaluation project gave me a form around which to shape my ideas about organizations and change. The study proved gratifying to explore the dialogue method in a field outside of the arts. Interestingly, the conclusions of the Planning Committee were similar to mine because we had travelled the same road. I learned that detachment and reflective praxis were critical skills and I learned patience. It was also satisfying that my close involvement gave me a certain authority among volunteers so that I was able to make positive contributions. Our discussions continue about how to sustain the momentum generated during the self-assessment.

The sense of community and the friendly atmosphere seem unperturbable and this is distinctive about McGill ILR. The ancient Chinese Book of Changes says a community flourishes when there are opportunities for its members to be usefully employed and when leaders can express initiative to employ their skills and develop new ones. In this way everyone makes a contribution to the community and harmony exists. This happens because each member works for the whole and if leaders take an interest in furthering continuity, the community can make great achievements (Wing, 1979).

Volunteer-led organizations need visionary leadership to survive our individual-centered competitive culture and promoting collective views and cooperation are essential to any community's survival. Individuals need new images, such as artists, hikers and homemakers (Apps, 1994) to help them learn more about who they are as leaders. Intuitive leaders who can balance personal vision with communal values are better equipped to help volunteer organizations survive, yet these powers of intuition are not well understood:

> *"We all know that leaders should help people see the big picture. But the actual skills whereby leaders are supposed to achieve this are not well understood... successful leaders... focus less on day-to-day events and more on underlying trends and forces of change. But they do this almost completely intuitively." (Senge, 1990, p.15)*

My conviction at the close of this study was that the more volunteers participated in the changes their organization was going through, the better they would be able to contribute to its

leadership.

An organization whose culture is based on human values has the ability to see and work with the flow of life (Kofman & Senge, 1993). The challenge for volunteer-led organizations is to maintain these values in practice. McGill ILR is the vanguard of the learning in retirement movement and it is timely that its leaders reach out to advise similar groups of older adults. By the year 2000 in Canada, older adults will account for 12 per cent of the population and their higher educational level translates into even greater numbers enrolling in adult education activities (Beatty & Wolf, 1996). If the number of individuals taking early retirement grows substantially, ILRs will no doubt witness immense changes as those born after World War II reach their third age.

5.4 Future Studies

The vast majority (from 80 to 90 per cent) of North America's population over 65 years of age are reported to be well and independent and psychologists now know that the attitude toward aging has changed from one of decline into one of integration (Butt & Beiser, 1987). Colleges and universities interested in addressing the needs of our aging population may look to ILRs as a model to provide mutually beneficial educational services (Linnehan, 1997). A crucial question that will affect the relationship between the sponsoring host institution and the ILR is whether the Institute can provide adequate volunteer resources to manage its own growth.

Future studies on volunteer organizations must address how growth impacts volunteer competency to manage expanded organizational complexity.

A specific challenge for an ILR is to maintain the loyalty of its volunteer-members who are at present predominantly female. Certainly, women volunteers have sustained McGill ILR. There is a body of gender-specific literature and research about women in leadership that suggests women have different ways of communicating; that is, they tend to be more personal and differ in their reactions to conflict and their uses of power (Rose, 1992). Certainly women in educational institutions have experienced being judged differently from their male colleagues (Shakeschaft, 1987; O'Keefe, 1991).

Women have different learning needs from men and the power relationships that are always present clearly affect learning (de Jong, 1983; Rice, 1986; Rosenthal, 1990; Chené & Fleury, 1992; Harold, 1992; Tisdell, 1993). The literature also suggests the underutilization of the productive potential of women volunteers (Rubin, 1982; Stevens, 1993; Stringer, 1993). If ILRs are to continue to flourish, future studies must first distinguish and then elaborate upon the ideas, experiences and values of women volunteers to assist them as they assume leadership roles.

5.5 Conclusion

Volunteer organizations are essential within communities to promote society's well-being and McGill ILR provides a model for other volunteer organizations in its approach to change. In addition to designing innovative study group activities, McGill ILR has recognized the importance for adults in the third stage of life to take responsibility for administering and improving their own continuing education program. Certainly at McGill Institute for Learning in Retirement, sharing leadership experiences and acquiring new skills has enhanced volunteers' self-awareness and joy of learning.

Appendix A

Protocol: Moderator Focus Groups

1. What is the role of the moderator in encouraging peer learning?
Probes: (a) What kinds of peer-learning techniques have you used in your study groups?
(b) Does style depend on the subject matter, the moderator, or both?
(c) If you do not use peer-learning techniques, what alternative methods do you use?

2. What is the role of the moderator in facilitating participation of group members?
Probes: (a) What types of participation have you experienced in your groups? How did they enhance or detract from learning?
(b) What is the level (quantity and quality) of participation in your group?
(c) How does the level of participation change over the course of a nine-week semester?
(d) How do you maximize participation?
(e) What do you consider to be the optimum group size? Does this differ according to the subject matter?

3. Does MILR provide quality learning opportunities for seniors?
Probes: (a) Which factors contribute to or detract from the quality of the MILR program?
(b) Does the program provide a university-level education?

4. What are the benefits and costs of being a moderator?
Probes: (a) Has being a moderator been a satisfactory experience? If so, why? If not, why not?

5. What do moderators need in order to ensure the quality of study groups?
Probes: (a) What kind of skills does a moderator need?
(b) What experiences did you draw on in order to be a moderator?
(c) How has your style of moderating evolved?
(d) Should there be training for moderators?
(e) How should MILR go about attracting new moderators?

Appendix B

Protocol: Interviews with Key Informants

Introduction: Funds have been awarded to MILR from Health and Welfare Canada's Seniors Independence Program for a long range planning project. The goals of the project are to develop evaluation mechanisms to ensure the self sustainability of MILR and to share these mechanisms with other seniors programs in a planning guide. The Planning Committee was established to oversee the process. In this interview, we are seeking your views on management issues in general and in your area of responsibility. All answers you give will be kept confidential.

1. Considering MILR in general and your position in particular, what do you think about the way it functions?
Probes: What has your experience been with:
(a) the solution of problems as they arise?
(b) the coordination of and between committees?
(c) communication within and with the outside?
(d) the maintenance of morale?
(e) the success of attracting members and moderators?
2. In your opinion, what are the responsibilities of membership in MILR?
3. How effectively does MILR make its members understand these responsibilities towards the organization?
Probes: What is the success or failure in this area:
(a) for MILR in general?
(b) for your area of responsibility?
4. In your opinion, are members recruited and utilized effectively for the work of running MILR?
Probes: (a) for MILR in general?
(b) for your area of responsibility?
5. Thinking specifically about moderators, what do you think about the present method of recruitment and training?
6. What has been your experience regarding the provision of facilities for your MILR tasks?
Probes: (a) equipment (b) space (c) personnel
(d) funds (e) etc.
7. What University resources do you use in your role?
8. In your opinion, what are the costs and benefits of membership in MILR?
Probe: As a committee chair/office-holder, what are the costs and benefits of membership?
9. What attracted you to your position?
Probes: (a) The aspects or nature of the position?
(b) Your background (work or training experience, inclination, etc.)?
10. What did you like about your position? What did you find difficult?
11. In conclusion, do you have any other comments about the management or about any other aspect of MILR?

May 16th 1994

McGill Institute for Learning in Retirement

MILR

MEMBER SURVEY

MILR is an organization run by the members for the members. This means it is especially important to listen to your ideas and suggestions. Please help us with our planning by taking time to answer this survey.

Please answer all questions. The entire questionnaire should take approximately 30 minutes to answer.

1. For how many years have you been an active member of MILR?
   [1] less than 1 [2] 1 [3] 2 - 3 [4] More than 3

2. List THREE strengths of MILR's program.

   1. _____

   2. _____

   3. _____

3. List THREE weaknesses of MILR's program.

   1. _____

   2. _____

   3. _____

4. Indicate the extent of your agreement with the following:

   This is a benefit I have experienced through MILR:

SD = Strongly Disagree D = Disagree N = Neutral (or not Applicable) A = Agree SA = Strongly Agree

		SD	D	N	A	SA
a.	increased understanding of one or more areas of study	[1]	[2]	[3]	[4]	[5]
b.	intellectual stimulation	[1]	[2]	[3]	[4]	[5]
c.	skills (such as writing, research or second language)	[1]	[2]	[3]	[4]	[5]
d.	personal development (such as leadership skills or increasing self-confidence)	[1]	[2]	[3]	[4]	[5]
e.	social interaction with peers	[1]	[2]	[3]	[4]	[5]
f.	satisfaction of contributing to the community at large	[1]	[2]	[3]	[4]	[5]
g.	satisfaction of being part of the McGill community	[1]	[2]	[3]	[4]	[5]
h.	easier adjustment to retirement	[1]	[2]	[3]	[4]	[5]
i.	enjoyment	[1]	[2]	[3]	[4]	[5]
j.	other (specify) _____	[1]	[2]	[3]	[4]	[5]

ABOUT THE STUDY GROUPS YOU ATTENDED

Answer questions 5 to 12 in relation to the study groups you took this semester. If you are not a member this semester, reply in relation to the study groups you took in the Winter semester. If you took two study groups please answer for each separately!

YOUR FIRST STUDY GROUP

5.1 Subject

[ ] Anthropology	[ ] Bible Studies	[ ] History	[ ] Philosophy	[ ] Science
[ ] Applied Social Studies	[ ] Current Events	[ ] Linguistics	[ ] Psychology	[ ] Sociology
[ ] Archaeology	[ ] Ecology	[ ] Literature	[ ] Writing/communications	
[ ] Area Studies	[ ] Economics	[ ] Music	[ ] Others (Specify)_____	
[ ] Art	[ ] Film Studies	[ ] Mythology	_____	

6.1 Are/were you the moderator? [ ] Y *If yes, go to 8.1* [ ] N *If no, go to 7.1.*

7.1 Did you do the following:

a.	contribute to the study plan or reading list	[ ] Y	[ ] N
b.	make a presentation	[ ] Y	[ ] N
c.	act as moderator	[ ] Y	[ ] N

8.1 How often did you do the following:

		never	rarely	sometimes	often	most of the time
a.	participate in discussions	[ ]	[ ]	[ ]	[ ]	[ ]
b.	study, read or write in preparation for class	[ ]	[ ]	[ ]	[ ]	[ ]

9.1 In your view what was the academic level of THIS study group?

[ ] much too low [ ] somewhat too low [ ] appropriate [ ] somewhat too high [ ] much too high

10.1 To what extent do you agree with the following statements about THIS study group?

SD = Strongly Disagree D = Disagree N = Neutral A = Agree SA = Strongly Agree

		SD	D	N	A	SA
a.	It stimulated my interest in the subject	[ ]	[ ]	[ ]	[ ]	[ ]
b.	It encouraged me to read, write or study	[ ]	[ ]	[ ]	[ ]	[ ]
c.	It provided a valuable learning experience	[ ]	[ ]	[ ]	[ ]	[ ]
d.	It enabled me to share my knowledge and /or experience	[ ]	[ ]	[ ]	[ ]	[ ]
e.	It provided an opportunity to meet people with similar interests	[ ]	[ ]	[ ]	[ ]	[ ]

11.1 a) Indicate ONE aspect of THIS study group you found particularly satisfying.

_____

b) What aspect of THIS study group (if any) did you find disappointing?

_____

12.1 a) Did you miss more than 2 classes? [ ] Y [ ] N

b) If Yes, what was the principal reason?

[ ] health reasons	[ ] dissatisfaction with the study group
[ ] personal reasons	[ ] program not what I expected

YOUR SECOND STUDY GROUP

(If you did not take a second study group, go on to the next page).

5.2 Subject

[1] Anthropology	[6] Bible Studies	[11] History	[16] Philosophy	[21] Science
[2] Applied Social Studies	[7] Current Events	[12] Linguistics	[17] Psychology	[22] Sociology
[3] Archaeology	[8] Ecology	[13] Literature	[18] Writing/communications	
[4] Area Studies	[9] Economics	[14] Music	[19] Others (Specify) _____	
[5] Art	[10] Film Studies	[15] Mythology	_____	

6.2 Are/were you the moderator? [1] Y *If yes, go to 8.2* [2] N *If no, go to 7.2*

7.2 Did you do the following:

a.	contribute to the study plan or reading list	[1] Y	[2] N
b.	make a presentation	[1] Y	[2] N
c.	act as moderator	[1] Y	[2] N

8.2 How often did you do the following:

	never	rarely	sometimes	often	most of the time
a. participate in discussions	[1]	[2]	[3]	[4]	[5]
b. study, read or write in preparation for class	[1]	[2]	[3]	[4]	[5]

9.2 In your view what was the academic level of THIS study group?

[1] much too low [2] somewhat too low [3] appropriate [4] somewhat too high [5] much too high

10.2 To what extent do you agree with the following statement about THIS study group?

SD = Strongly Disagree D = Disagree N = Neutral A = Agree SA = Strongly Agree

	SD	D	N	A	SA
a. It stimulated my interest in the subject	[1]	[2]	[3]	[4]	[5]
b. It encouraged me to read, write or study	[1]	[2]	[3]	[4]	[5]
c. It provided a valuable learning experience	[1]	[2]	[3]	[4]	[5]
d. It enabled me to share my knowledge and /or experience	[1]	[2]	[3]	[4]	[5]
e. It provided an opportunity to meet people with similar interests	[1]	[2]	[3]	[4]	[5]

11.2 a) Indicate ONE aspect of THIS study group you found particularly satisfying.

_____

b) What aspect of THIS study group (if any) did you find disappointing?

_____

12.2 a) Did you miss more than 2 classes? [1] Y [2] N

b) If Yes, what was the principal reason?

[1] health reasons	[3] dissatisfaction with the study group
[2] personal reasons	[4] program not what I expected

ABOUT THE STUDY GROUP PROGRAM

Now that you have told us about specific study groups, please give us your views on study groups in general.

13. Indicate the extent of your agreement with the following:

For me as a participant these activities are important:

SD = Strongly Disagree D = Disagree N = Neutral (or not Applicable) A = Agree SA = Strongly Agree

		SD	D	N	A	SA
a.	contributing to the study plan or reading list	[1]	[2]	[3]	[4]	[5]
b.	participating in group discussion	[1]	[2]	[3]	[4]	[5]
c.	studying, reading or writing in preparation for class	[1]	[2]	[3]	[4]	[5]
d.	making a presentation in class	[1]	[2]	[3]	[4]	[5]
e.	listening to others	[1]	[2]	[3]	[4]	[5]
f.	sharing my ideas with others	[1]	[2]	[3]	[4]	[5]
g.	learning from the moderator	[1]	[2]	[3]	[4]	[5]
h.	acting as moderator	[1]	[2]	[3]	[4]	[5]

14. What three characteristics or skills do you consider most important in a moderator?

1. _____

2. _____

3. _____

15. How many 9-week study groups have you taken since you first joined MILR? (If you took the same topic more than once, count one for each time you took it).

[1] 1 - 2 [2] 3 - 5 [3] 6 - 10 [4] 11 or more

16. What three subjects do you most want to be available (check 3 ONLY).
(It is not within the MILR mandate to offer physical education, "how to" courses, or second language teaching).

[1] Anthropology	[6] Bible Studies	[11] History	[16] Philosophy	[21] Science
[2] Applied Social Studies	[7] Current Events	[12] Linguistics	[17] Psychology	[22] Sociology
[3] Archaeology	[8] Ecology	[13] Literature	[18] Writing/communications	
[4] Area Studies	[9] Economics	[14] Music	[19] Others (Specify) _____	
[5] Art	[10] Film Studies	[15] Mythology	_____	

17. (a) This semester (or in your most recent semester) were you able to get a place in your first choice of study group? [1] Y [2] N

(b) If No, which subject was not available _____

18. Do you think that individual study groups should be evaluated at the end of each semester by members of the group? [1] Y [2] N

ABOUT OTHER ISSUES

19. Are there activities you might suggest to complement the current study group and Special Events programs?

_____

_____

20. (a) Are you kept adequately informed of MILR activities? [ ] Y [ ] N

(b) If No, please specify _____

21. Which items in the newsletter do you read (Check all that apply):
[ ] MILR news [ ] Literary contributions [ ] Member profiles
[ ] Editorials [ ] Reports of Special Events

22. Are there other areas that you would like to see covered by the newsletter?

_____

23. (a) How do you usually arrive at MILR?

[ ] on foot [ ] by public transportation [ ] by car

(b) If you arrive by car, do you park at a McGill facility? [ ] Y [ ] N

24. How long does it take you to get from home to MILR?

[ ] less than 30 mins [ ] 30-60 mins [ ] 60-90 mins [ ] more than 90 mins

25. (a) Have you volunteered to work on any committees or to help with any administrative tasks? [ ] Y [ ] N (If no, go to 27)

(b) If yes, were you called upon to help? [ ] Y [ ] N (If no, go to 27)

(c) If yes, what work did you do? (Check all that apply)
[ ] Member of Committee (specify) _____
[ ] Worked at registration
[ ] Wrote for the newsletter
[ ] Assisted moderator with administrative tasks
[ ] Worked on special events
[ ] Helped with mailings
[ ] Other (specify) _____

(d) Regarding the work you reported in (c), calculate approximately how many hours you spent on this during the last 12 months. [ ] 8 hours or less [ ] 9-40 hours [ ] more than 40 hours

26. Have you been or are you currently a member of MILR Council? [ ] Y [ ] N

27. Have you been or are you now a moderator? [ ] Y [ ] N
If Yes, answer questions 28 to 35. If No, skip the next page and go on to question 36.

FOR THE MODERATORS

We learned a lot from the moderator focus groups held in April. Your answers to the following questions will add a statistical dimension.

28. How many 9-week study groups have you moderated since you first joined MILR? (If you moderated the same topic more than once, count one for each time).

[1] 1 [2] 2 - 3 [3] 4 - 8 [4] 9 or more

29. How well are you able to fulfil your role as moderator?
[1] very well [2] reasonably well [3] with difficulty [4] not at all well

30. In which of the following would you find it useful to participate? (Check all that apply)
[1] group discussions of moderators
[2] workshops on group dynamics
[3] workshops on peer learning
[4] the pairing of new with experienced moderators (mentoring)
[5] other (specify) _____

31. Indicate your level of expertise in the subject studied (in comparison with others in the study group).
[1] an expert
[2] knowledgeable or experienced
[3] no more knowledgeable or experienced than others

32. Moderators have different styles. Although you may see yourself in more than one of the following roles at various times, which one would you say is predominant?
[1] organizer [2] animator [3] teacher

33. Which one of the following best describes the approach used in your most recent study group?
[1] Participants consult bodies of knowledge established by academic disciplines.
[2] Participants communicate real or imaginary experiences by producing written texts.
[3] Participants examine works of art, music, film or literature to deepen their appreciation and enjoyment.
[4] Participants exchange personal experiences on a chosen topic.

34. Which aspects of peer learning are involved in your study group(s)? (Check all that apply)
[1] presentations of research or personal texts
[2] discussion of presentations
[3] discussion of a work read or reviewed by all
[4] exchange of ideas or experiences
[5] Other (explain) _____

35. (a) Do you have problems with members of your study group who do not fulfil their obligations as peer learners? [1] Y [2] N

(b) If yes, explain: _____

_____

ABOUT YOURSELF

We would be grateful if you would complete the next section about yourself. The data is intended to enable MILR to build a profile of its clientele for planning purposes. We do not expect you to sign your name. This information will be used only for statistical purposes.

36. Gender [ ] M [ ] F

37. Mother Tongue
[1] English
[2] French
[3] Other

38. Language most often used
[1] English
[2] French
[3] Other

39. (a) Are you married? [ ] Y [ ] N
(b) If you are married, has your spouse also been a member of MILR this year? [ ] Y [ ] N

40. Age
[1] under 55
[2] 56-60
[3] 61-65
[4] 66-70
[5] 71-75
[6] 76-80
[7] 81-85
[8] over 85

41. (a) Were you born in Canada? [ ] Y [ ] N

(b) If no, when did you arrive in Canada?
[1] Before 1940
[2] In the 40's
[3] In the 50's
[4] In the 60's
[5] In the 70's
[6] In the 80's
[7] In the 90's

42. What is your highest level of education?
[1] secondary school
[2] college/vocational
[3] university/professional
[4] graduate studies

43. Do you live alone? [ ] Y [ ] N

44. What is your combined annual household income?
[1] less than $15,000
[2] $15,000 - $30,000
[3] above $30,000

45. (a) Do you leave Montreal for an extended period of time each year (at least one month)?
[ ] Y [ ] N

(b) If yes, during which months? _____

46. Please indicate what you consider to have been your principal occupation during your adult life.
(e.g. mechanical engineer, high school teacher, medical secretary, homemaker)

_____

_____

47. Are you currently (check more than one if appropriate):
[1] employed full-time
[2] employed part-time
[3] self-employed
[4] seeking employment
[5] engaged in volunteer work
[6] homemaker/caregiver
[7] fully retired

48. Do you have ties to McGill other than through MILR? (check all those that apply)
[1] McGill graduate
[2] McGill academic staff
[3] McGill support staff
[4] Close relative is McGill graduate
[5] Close relative is McGill student
[6] None of the above

49. In the last twelve months have you participated in any McGill activities other than MILR? (check all those that apply)
[1] Continuing Education courses
[2] Day faculty courses
[3] Summer School courses
[4] Public Lectures
[5] Alumni/Alumnae activities
[6] MATCH program
[7] None of the above

50. Have you participated in any of the following educational programs in the last twelve months? (check those that apply)
[1] Encore
[2] Thomas More
[3] Elderhostel
[4] Concordia
[5] Golden Age Assoc.
[6] Other (Specify) _____

ADDITIONAL COMMENTS

Do you have any additional comments you would like to make about MILR?

Thank you for taking time to answer our questionnaire.
Please return it in the self-addressed postmarked envelope to:

MILR Member Survey
McGill Centre for Continuing Education
770 Sherbrooke Street West
Suite 316
Montreal, QC
H3A 1G1

McGill Institute for Learning in Retirement

MILR

SURVEY OF FORMER MEMBERS

MILR is an organization run by the members for the members. Even though you are no longer a member it is important to listen to your ideas and suggestions. Please help us with our planning by taking a few minutes to answer this survey. **The questionnaire should not take more than 10 minutes to answer.**

1. For how many years were you an active member of MILR?

[1] less than 1 [2] 1 [3] 2 - 3 [4] More than 3

2. List THREE strengths of MILR's program.

1. _____

2. _____

3. _____

3. List THREE weaknesses of MILR's program.

1. _____

2. _____

3. _____

4. Indicate the extent of your agreement with the following:

What I liked about the study group format was:

SD = Strongly Disagree D = Disagree N = Neutral A = Agree SA = Strongly Agree

		SD	D	N	A	SA
a.	It stimulated my interest in the subject	[1]	[2]	[3]	[4]	[5]
b.	It encouraged me to read, write or study	[1]	[2]	[3]	[4]	[5]
c.	It provided a valuable learning experience	[1]	[2]	[3]	[4]	[5]
d.	It enabled me to share my knowledge and /or experience	[1]	[2]	[3]	[4]	[5]
e.	It provided an opportunity to meet people with similar interests	[1]	[2]	[3]	[4]	[5]

5. **Listed below are possible reasons why you did not return to MILR in 1994. To what extent are these your reasons for not returning.**

	Major reason	Minor reason	Not a reason
Program related			
Program not what I expected	[1]	[2]	[3]
Subjects offered did not interest me	[1]	[2]	[3]
Could not get into the study group(s) I wanted	[1]	[2]	[3]
Too much study/preparation expected of members	[1]	[2]	[3]
Did not like the study group format	[1]	[2]	[3]
Academic level too high	[1]	[2]	[3]
Academic level too low	[1]	[2]	[3]
Preferred lecture style courses	[1]	[2]	[3]
Preferred program at another institution	[1]	[2]	[3]
Personal reasons			
Personal problems	[1]	[2]	[3]
Family responsibilities	[1]	[2]	[3]
Time constraints	[1]	[2]	[3]
Health problems	[1]	[2]	[3]
Financial problems	[1]	[2]	[3]
Transportation or parking problems	[1]	[2]	[3]
Out of town during MILR session	[1]	[2]	[3]
Moved away	[1]	[2]	[3]
Personal priorities changed	[1]	[2]	[3]
Not motivated to continue	[1]	[2]	[3]
Did not feel at home at MILR	[1]	[2]	[3]

ADDITIONAL COMMENTS

Do you have any additional comments you would like to make about MILR?

Thank you for taking time to answer our questionnaire.
Please return it in the self-addressed postmarked envelope to:

MILR Member Survey
McGill Centre for Continuing Education
770 Sherbrooke Street West
Suite 316
Montreal, QC
H3A 1G1

Appendix E
A Comparison of Dialogue and Debate

Dialogue is collaborative: two or more sides work together toward common understanding.

Debate is oppositional: two sides oppose each other and attempt to prove each other wrong.

In dialogue, finding common ground is the goal.

In debate, winning is the goal.

In dialogue, one listens to the other side(s) in order to understand, find meaning and find agreement.

In debate, one listens to the other side in order to find flaws and to counter its arguments.

Dialogue enlarges and possibly changes a participant's point of view.

Debate affirms a participant's own point of view.

Dialogue reveals assumptions for reevaluation.

Debate defends assumptions as truth.

Dialogue causes introspection on one's own position.

Debate causes critique of the other position.

Dialogue opens the possibility to reaching a better solution than any of the original solutions.

Debate defends one's own positions as the best solution and excludes other solutions.

Dialogue creates an open-minded attitude: an openness to being wrong and an openness to change.

Debate creates a closed-minded attitude, a determination to be right.

In dialogue, one submits one's best thinking, knowing that other peoples' reflections will help improve it rather than destroy it.

In debate, one submit's one's best thinking and defends it against challenge to show that it is right.

Dialogue calls for temporarily suspending one's beliefs.

Debate calls for investing wholeheartedly in one's beliefs.

In dialogue, one searches for basic agreements.

In debate, one searches for glaring differences.

In dialogue, one searches for strengths in the other positions.

In debate, one searches for flaws and weaknesses in the other position.

Dialogue involves a real concern for the other person and seeks to not alienate or offend.

Debate involves a countering of the other position without focusing on feelings or relationships and often belittles or deprecates the other person.

Dialogue assumes that many people have pieces of the answer and that together they can put them into a workable solution.

Debate assumes that there is a right answer and that someone has it.

Dialogue remains open-ended.

Debate implies a conclusion.

Source: Study Circles Resource Center (1993), A Guide to Training Study Circle Leaders, Pomfret, CT.

Appendix F
Four Recommendations for the Future

Recommendation 1: Provide support for moderators with: (a) workshops in group dynamics and peer group leadership led by accomplished moderators; (b) nominate a member to represent moderators on the Curriculum Committee and serve as their spokesperson.

Recommendation 2: The retreat held in May 1997 (Maintaining Momentum II McGill ILR: Now and in the Future) should be held biannually to give members the opportunity to voice their ideas on discussion themes. Facilitators and scribes should be given instruction on how to conduct a dialogue in small groups. Transcribe and analyze the information then distribute it throughout the organization and assist volunteers to integrate the recommendations into their areas of responsibility. Appropriate action should be taken so that information is properly used and not wasted (Sell, 1989).

Recommendation 3: Orientation or welcoming sessions for new councillors and members could be integrated with mock study groups and Council sessions to give volunteers hands-on experience. Job descriptions should be available for open consultation to encourage volunteers to come forward.

Recommendation 4: To avoid McGill ILR's marginalization from the host university, volunteers should be encouraged to discover ways to contribute their variety of talents and experiences to McGill's institutional life. The liaison's role can be to serve as a resource and advisory person in the accomplishment of ideas, such as: (a) creating an intergenerational mentoring program for Continuing Education's foreign language students and (b) developing an award for a graduating student in the new Diploma in Gerontology Program.

Appendix G

Consent Form

I, the undersigned, have read and discussed Carolynn Rafman's M.A. thesis proposal with her. I give my permission and consent to participate in her case study on peer learning and peer management for research purposes. It is understood that the process of data collection will be set up and administered by the MILR Planning Committee.

It is my understanding that the information shall be held in strict confidence and discussed with me before publication of the thesis.

Signature:_____

Name: _____

Address:_____

_____

Signature: _____
For the McGill Institute for Learning in Retirement Planning Committee

Date: _____

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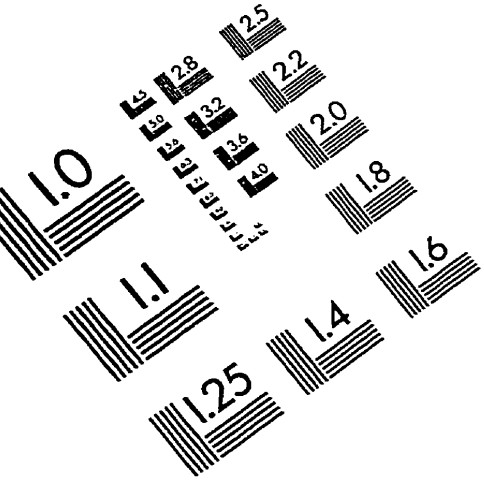
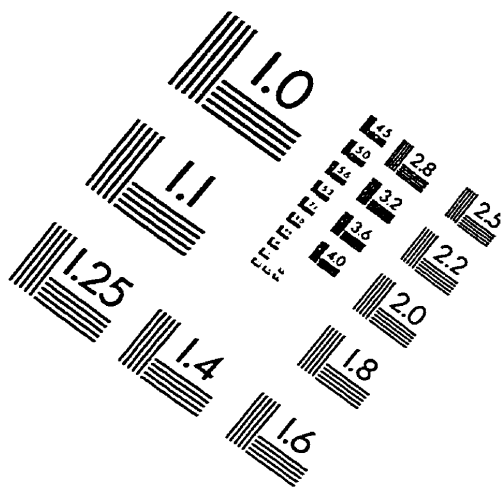
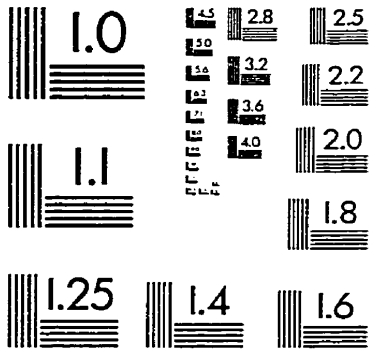
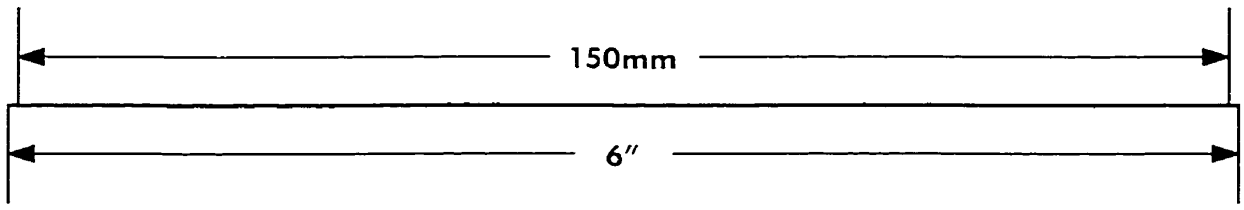
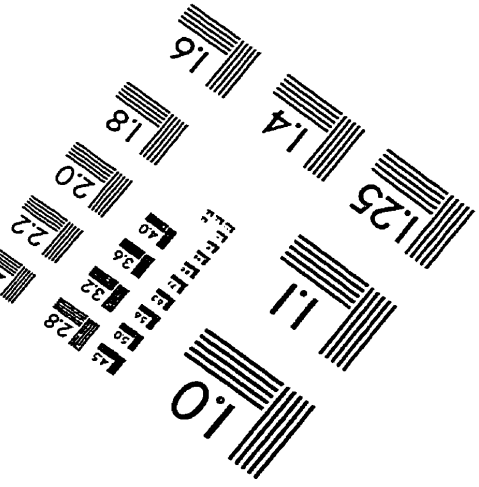
IMAGE EVALUATION TEST TARGET (QA-3)

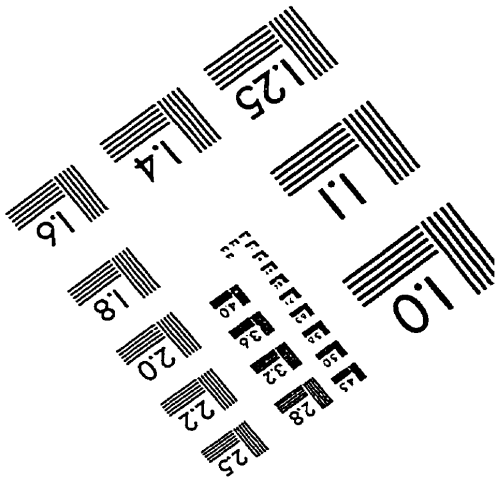












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