DEVELOPMENT OF A MODEL FOR A LOCAL VOLUNTARY CONSUMER ORGANIZATION

by

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STATEMENT BY AUTHOR

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SIGNED: Judith Gordon Hurl.
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ABSTRACT

Consumers all over the United States are attempting to organize into groups to assert their rights collectively. To aid in this organization of concerned consumers, a model was developed for a local consumer organization.

The model covers five important areas:

--organizational dynamics
--organizational structure
--volunteer recruitment, selection, training, and motivation
--funding sources and methods
--communication

In addition to these five areas, four selected topics were covered, which included dispute handling, educational projects, newsletters, and lobbying.

The model was separated into an organizational phase and an implementation phase, and these two areas were covered in depth. A third phase, continuation, was dealt with briefly.

Finding information was difficult because so little has been written about developing a model for a consumer organization. Results from surveying existing organizations were limited because few of the organizations replied to a request for information, and the literature they did send was brief and dealt with very specific topics.
CHAPTER 1

INTRODUCTION

This study develops a model for a local volunteer consumer organization drawing upon the characteristics of volunteer organizations and voluntary consumer organizations. The model will deal with organizational dynamics, organizational structure, volunteer recruitment, selection, training and motivation, communications, and sources, and methods of funding. This study will draw upon the information available and establish guidelines which will be useful in creating a voluntary consumer organization.

History

In today's complex society, volunteer workers are essential to the effectiveness of many agencies which serve the public. A voluntary association is a group of people, formally organized around a statement of purpose, structure and process, where membership is voluntary and members participate in decision-making by voting on major policy matters (DeBoer 1970).

The goal in organizing a volunteer service organization is to modify attitudes or behavior of members of a
particular group. An aim may be to improve social provisions for some disadvantaged people (Ecklein 1972).

**Anderson's Perspective of Voluntary Associations in History**

Anthropologist Robert Anderson (1971) discusses voluntary organizations and associations in his comprehensive article, "Voluntary Associations in History." During the first million years of man's existence, people belonged to bands because these groups met their kinship or territory needs. Voluntary associations were more formally established in Neolithic villages (8000 B.C.) to serve important social and cultural functions. During the "Bronze Age" (3000 B.C.), voluntary organizations such as guilds emerged among the higher social classes to further the interests of merchants.

With the Industrial Revolution came a proliferation of voluntary groups in North America and Europe. A new phase was inaugurated; voluntary associations shifted to a "rational-legal" status. This new type of organization possessed written statutes clearly defining membership, obligations, roles, and conditions of convocation. The voluntary association became a legally recognized corporate identity. In this "rational-legal" mode, the organization is "rational" in the sense that it is geared to efficiency in making decisions and taking action. It is "legal" in the
sense that compliance in decisions and actions is sanctioned by the impersonal force of the law.

The first stage of development of volunteerism in the United States occurred at the time of colonization. New immigrants were forced to band together for survival. From the time of the Civil War until the 1930s, many volunteer organizations were established; the Red Cross, the YMCA, and Boys' Clubs are three organizations still active today.

Until the mid-1930s, Anderson explains, volunteer service had been open only to the wealthy. Then in 1938, it opened to middle class Americans with the establishment of the "March of Dimes." By the 1960s, participatory democracy began to include all levels of society (Anderson 1971).

The Twentieth Century has been a period of dynamic change for voluntary service organizations which experienced an increase in the demand for services they offer. Voluntary organizations have had to adjust, reorganize, and re-direct efforts to meet changing needs. Consumer-oriented organizations have also re-established and regrouped in an attempt to meet consumers' needs.

With the conscience-raising of the Sixties, the need for service-oriented volunteer consumer organizations was more strongly felt. People began to demand consumer services at the local level, and voluntary consumer organizations were formed to provide day-to-day, continuing services
to the community. These groups took an active part in providing information, lobbying, handling disputes, and educating the public in their rights as consumers.

Sorensen's View of the Consumer Movement

But volunteer consumer organizations are not a result of the increased awareness of the 1960s. One of the most comprehensive studies of consumer groups was The Consumer Movement, written by Helen Sorensen (1941). Consumer activity in the United States began with consumer cooperatives before the middle of the Nineteenth Century. In 1899, the Consumers' League of New York was formed to improve working conditions. The American Home Economics Association first met in 1908 with the idea of helping to set standards to help establish foundations for wiser consumer choice.

Efforts were sporadic at establishing a unified approach to consumer problems from 1890 to 1960. One of the most outstanding efforts was passage of the First Food and Drug Act of 1906. With the publication of Upton Sinclair's book, The Jungle, people were appalled at the idea of what might be in the food they were eating. The American Pure Food League was established and helped in getting the revolutionary piece of legislation passed.

Your Money's Worth, written by Stuart Chase and F. J. Schlink, in 1927 (Sorensen 1941) explored
the advertising and selling of products to consumers. In addition to providing information, the book was a plea for impartial testing agencies and for standards for staple consumer goods. This literature resulted in the establishment of three separate testing agencies, two of which are still active today, Consumer's Union and Consumer's Research.

By 1930, and the onset of the Depression, consumers were becoming more aware of the need to buy carefully. Quality deterioration became the impetus for the formation of some groups such as the Consumer Conference of Cincinnati which demanded commodity information and standards.

The introduction of rayon onto the market in the mid-1930s created additional need for consumer influence. The New York City Federation of Women's Clubs in 1937 took up the fight for labelling of rayon on garments because rayon was not washable. Being unlabelled, consumers would wash the garment and then discover it was ruined, so they asked women to get written identification on their sales receipts if a fabric was rayon and to send these receipts to the Federal Trade Commission. The flood of receipts the FTC received convinced the Commission the women were serious, and they established rules requiring the labelling of rayon contents on garments.
Although it took five years to get it passed, Soren­
sen states, a new Food, Drug and Cosmetics Act became law in
1938. This legislation protected consumers even more than
the Act of 1906. In addition to the new law, the Wheeler-
Lea Act was passed which placed the control of advertising
under the auspices of the Federal Trade Commission. Final­
ly, consumers were finding more government protection in
their dealings with business.

During the Depression the federal government became
involved in the movement. Federal agencies dealing with
consumer issues were formed. The National Recovery Act
(NRA) program established a Consumers' Advisory Board. The
Agricultural Assistance Association (AAA) provided for a
Consumers' Council. The problem with these two councils
was their lack of strong organized support like that of labor
and industry.

During this time, many women's organizations became
interested in consumer affairs. The American Association of
University Women gathered data on many current issues of
concern. The General Federation of Women's Clubs established
a platform of consumer-business relationships. Consumer
interests were a part of the general program of the Nation­
al Congress of Parents and Teachers. The National League of
Women Voters included consumer concerns in their legislative
lobbying. An expert committee to follow and interpret
developments in different areas of consumer interest was one project of Consumers' National Federation.

These national organizations promoted the interests of the American consumer; local groups did so, too. The Consumers' Council and Consumers' Federation of St. Louis was a consumer pressure group. In Boston, the Consumers' Institute of Massachusetts worked closely with the Boston Better Business Bureau to help alleviate consumer problems (Sorensen 1941).

**Summary of Observations**

These brief descriptions illustrate one salient point; these were separate entities in themselves. There was no formal organization of consumer interest groups. There was little, if any, consensus on what a consumer agency was or how it should be run. Models of organization were unknown and each separate group was formed and run by the interest people in that area. Without a communications network, little research was done or interest shown in establishing models for action.

Unity and communication among consumer groups are lacking. The need exists for the rational development of a basic model for an organization which can be utilized, with changes and adjustments, by many diverse groups. Use of such a model would facilitate communication and unification of existing organizations and the creation of new chapters.
The stronger foundation provided would result in a stronger, more powerful consumer voice.
CHAPTER 2

REVIEW OF LITERATURE

General Information of Volunteer Organizations

When people join together as an action group, they do so in an attempt to modify attitudes and behavior. People want to improve the quality of life for those who are disadvantaged or enhance social relationships so a target population may deal with a problem. Organizing is a means of achieving and guiding control over these problems (Ecklein and Lauffer 1972).

Volunteer workers are involved in solving these problems. Organizations utilize volunteer power to fulfill three societal needs:

1. To serve as access points by offering information, advice, and referrals.
2. To serve as pressure points by seeking to alter policies and practices of other organizations.
3. To offer direct services where they are inadequate or lacking (Perlman 1975).

There has been a growth in the number of volunteer organizations for two reasons. A democratic social system depends to a high degree on volunteers' time for maintenance,
stability, growth, and development of many programs. At the same time, volunteer organizations provide personal satisfaction and self-actualizing growth opportunities for each volunteer. The volunteer organizations benefit society while at the same time contributing personal benefits to the volunteer worker (Schindler-Rainman and Lippitt 1975).

Organizational Dynamics

There seems to be confusion in defining the word "organization." For this researcher's purposes, "organization" has been defined in two ways: organizational dynamics and organizational structure. This section deals with organizational dynamics, so it will be defined here, and organizational structure will be defined in the following section.

Organizational dynamics refers to the intangible, internal workings of an organization. These internal actions of an organization include planning, establishment of principles and goals, determination of qualities of leadership, and evaluation of programs.

Planning

Planning is a tool which enables an organization to keep its purposes in sight and adjust to changing needs. It is the predetermination of a course of action (DeBoer 1970; Reimnitz 1972). Planning provides a way to deal with
changes by building a base of support for the organization as it moves into new programs and styles of operation (DeBoer 1970). It helps to direct the organization's activities towards the "modification, elimination, and creation" of policies, programs, services, or resources in organizations (Ecklein and Lauffer 1972). It is necessary because it helps the organization adapt to change.

The planning process can be broken down into four steps:

1. Define concern (problem, need, issue).
2. Establish a goal relative to that concern.
3. Devise an effective program to reach the goal.
4. Evaluate what the program is accomplishing (Ecklein and Lauffer 1972).

The planning process may be implemented for either short-term projects or long-term programs (O'Connell 1976). In either case, the above four principles should be utilized.

An organization may delegate the planning process to a policy group or seek the opinion of the general membership. Whether or not a policy group is formed, the organization must arrive at a decision which is acceptable to the majority of individuals on the policy-making board and to the general members (DeBoer 1970).

Part of the planning process of any organization is the establishment and definition of four basic components:
1. **PURPOSE**--expresses the organization's reason for existence.

2. **GOAL**--may be one of several goals consistent with the purpose. It is the aim or desired end resulting from action in response to a concern, problem, or need.

3. **OBJECTIVE**--is a clearly defined, specific component of a goal, shaped by the needs it fulfills and by the limitation of resources available. It should be specific and scheduled so progress may be measured.

4. **PROGRAMS**--is the planned series of actions or events utilized to achieve a given objective (DeBoer 1970).

By predetermining what these four components are at the beginning of operation, an organization will have a better understanding of what it hopes to accomplish and how it intends to accomplish its tasks. A constant re-evaluation of the above criteria is necessary so an organization may determine where it stands and what new goals and objectives may be developed.

**Leadership**

Leadership is an important aspect of any organization. Without intelligent, mature leadership an organization may fail to become a vital group within the community.

Leadership can be divided into two categories, first leadership and continuing leadership. In the literature,
first leadership is most often described as "charismatic" leadership and usually pertains to religious leaders such as Christ or Mohammed. But first leaders are also found in other areas.

A charismatic or first leader is an important agent in society, inspiring people with a mastery of the spoken word. S/he is a social pioneer, fighting for causes which are new and changes which people feel must come (Haiman 1950). This description can be applied to the leadership of a voluntary consumer organization. People will rally around a charismatic leader who will fight for consumer causes and attempt to initiate change.

The first leader is usually selected in the enthusiasm of a first campaign and should approach leading the group in a very loose way (Ecklein and Lauffer 1972). Self-discipline must be a facet of a first leader's personality because of the many tasks, problems, and situations with which s/he will be faced. The best organizing first leaders have a "single-track" mind which is devoted to building the organization. The job of a first leader is to organize and implement, not "right wrongs"; that will come with continuing leadership.

Continuing leadership is leadership by an individual who can devote more time to programs and help the organization to grow. A continuing leader may institute new
programs and projects, allowing previously established programs to be run by other members (Benne 1948).

The functions of a leader are many and varied:

1. Helping the group set goals and purposes.
2. Keeping the balance between long- and short-term goals.
3. Planning the use of resources by gathering and using accurate information.
4. Putting plans into action.
5. Evaluating plans, actions, and results of implementation (Benne 1948).

Group behavior is another important aspect of leadership (Peterson 1955). The group must determine common tasks to accomplish or problems to solve; a leader must guide an organization to these ends. The leader must be aware that each member brings certain personal needs to the situation, and these needs can be satisfied through interrelationships among group members as they work together toward goals. Thus, clarification of group goals becomes a crucial function of the organization and the leader. Leadership is concerned with how group members can work together in clarifying and reaching goals (Peterson 1955). This becomes a matter of allowing people to contribute what they can and the leader's direction of their efforts.
Evaluation

Periodically, leadership must determine whether the organization is reaching its goals successfully. This is done through evaluation. Those involved must decide whether achievements meet stated objectives. They must also determine whether the organization is carrying out major projects successfully, while at the same time responding to unexpected crises and opportunities.

The evaluation process is accomplished by reviewing committee reports, studying financial records, and comparing the organization's present circumstances with stated objectives and goals (O'Connell 1976). Part of the evaluation process may be the establishment of a committee to review the above criteria and submit a report to the general membership (DeBoer 1970). By following this procedure, the entire membership may be involved in the evaluation.

The literature did not provide criteria for an organization to use in the evaluation process. There were no lists to check against or guidelines which could clarify and delineate what is necessary for good evaluation.

Organizational Structure

Organizational structure is defined as the tangible framework of an organization. This definition deals with the actual composition of an organization, including the roles of:
The Organizer

In some situations, the task of organizing a group falls upon the shoulders of one or a few trained "organizing" people. These people are trained by a parent organization to help citizens form a group (Ecklein and Lauffer 1972). The organizer's role will be different from that of a president or an executive director. The organizer will be concerned with getting a group of people together to form and run an organization; s/he will not be directly involved with day-to-day activities.

The organizer's role is varied. This person must be a "communicator, negotiator, mediator, advocate, and supervisor," because s/he must perform many tasks to help an organization become functional (Ecklein and Lauffer 1972). An organizer must be able to get the people together to build the organization. The members can assume the responsibilities of development of the organization.

The President

The president is elected from the membership to lead the organization. This person is responsible for planning,
recruiting and motivating volunteers, and coordinating and evaluating activities (O'Connell 1976).

In planning for the organization, the president must decide on one to three things to be accomplished during her/his administration. The president should not try to change a great deal over the course of the term, but s/he must decide what is needed in the future and attempt to develop programs to guide the organization in that direction (O'Connell 1976).

Recruitment and motivation of volunteers are two very important jobs of the president. The president may attempt to improve recruitment by selecting qualified people to fill leadership positions who are good organizers, know their area, and can work with people (Ecklein and Lauffer 1972). This can be a very difficult task because a president will not usually be familiar enough with members to be able to make judgments about performances until the members have proven themselves over a period of time.

In motivating volunteers, the president should be involved in different aspects of the organization so her/his presence can be felt. A president must stay in contact with members and encourage them to do their best.

A president must be able to coordinate the many varied activities going on within the organization. Avoidance of conflicts with programs or projects is one coordinating
task. Another coordinating concern would be that of activities of different committees so they do not overlap or conflict (O'Connell 1976).

Evaluation activities of the president are also important. Progress must be evaluated periodically so more efficient approaches may be implemented if necessary (Ecklein and Lauffer 1972). If changes are needed, either in programs or committee chairpersons, these too must be initiated by the president.

The literature reviewed described presidential duties in detail, but it is difficult to imagine a person being able to perform all of them well. A president must decide which duties are most important for her/his particular organization and attempt to perform those efficiently.

The Board of Directors

The board of directors is selected from the general membership. They are a group of people who have proven an interest in the causes of the organization and who have the ability to help the organization pursue these causes (O'Connell 1976).

The task of the board of directors is to set policy and to deal with major decisions of the organization. The board should meet frequently so problems and issues may be dealt with as they arise (O'Connell 1976). The board decides how to deal with these problems by determining action
at that point or referring the question to a committee. The board determines what committee to refer it to, the task of the committee, and when the committee must report back to the board (DeBoer 1970).

Some board members have specialty areas, others must be trained. Board members should be trained to have insight into problems and issues of the organization (Ecklein and Lauffer 1972).

The Professional Staff

The role of the professional staff is not to make policy, that is the job of the board of directors, but to administer it (DeBoer 1970). The staff exists to help volunteers do the work of the organization; they should not be expected to or allowed to do the job directly (O'Connell 1976). The staff must attempt to bring about maximum volunteer dedication, involvement, and responsibility so volunteers may find satisfaction. They must stimulate, educate, and serve the volunteers (O'Connell 1976).

The duties of the professional staff include enabler, broker, advocate, and activist (Grosser 1976). The role of a professional worker is defined as that of guide, expert, and therapist by others (Ross 1967). By looking at both definitions, a professional staff member is seen to provide service to the volunteers by providing continuing day-to-day contact with the programs and projects of the organization.
Twelve functions of a staff which are important to the success of an organization include:

1. Establishment of annual goals in terms of increased volunteer involvement and commitment.
2. Provide all possible assistance to volunteers.
3. Provide staff service to president and committee chairpeople.
4. Provide service to officers and board members.
5. Help identify points of view and talent needed on board and committees.
6. Know the facilities in the person's own area.
7. Be sure the organization operates a competent information and referral service.
8. Place a priority on planning.
10. Recognize the role as basic communication link in the community.
11. Keep goals in sight.
12. Provide all possible credit, thanks, and satisfaction for volunteer activity (O'Connell 1976).

Executive Director

The role of the executive director is tied to the functions of volunteer membership and the professional staff. The executive director must take the decisions of the board of directors and/or the general membership and
develop programs and policies for the professional staff. S/he is responsible for fulfilling the staff role in contrast to the volunteer role (O'Connell 1976).

The executive director is involved with the board of directors or committee chairpersons in the planning of programs (DeBoer 1970). S/he must understand the planning process and its relationship to the decision-making process. The goals of the organization and the executive director should be compatible (DeBoer 1970).

Since the role of the staff is to assist the volunteer members, the executive director must help the professional staff do this job. Once programs and policies have been established, the executive director must oversee and coordinate the staff's role so jobs may be accomplished in an efficient manner.

Volunteer Recruitment, Selection, Training, and Motivation

Volunteer Recruitment

Planning for volunteer recruitment includes many aspects. Recruitment is important to an organization, and the first step in volunteer recruitment is the selection of a director of volunteers. This person must participate in the planning of all volunteer recruitment programs from the beginning (Cull and Hardy 1974).
An organization must next determine how many people are needed. An attempt must be made to predict how many volunteers can be recruited in a specified period of time (O'Connell 1976).

Planning also involves determination of jobs which need to be done and skills needed to do the jobs (Schindler-Rainman and Lippit 1975). In addition to the determination of the positions to be filled, a recruitment campaign must discover the expectations and needs of the volunteers and a program must be planned to meet these needs (Stenzel and Feeney 1976).

Establishment of a recruiting committee to work with the volunteer recruiter can accomplish many tasks. Sources of volunteers must be explored, as well as particular market segments to tap.

Volunteers can be found in many places and in many ways. Some suggested methods of recruitment include:

1. Self-recruitment—volunteering on own initiative.

2. Informal recruiting—reaching potential volunteers through people who are already members.

3. Coffees and meetings can be held for local community organization leaders to ask their help and cooperation in publicizing volunteer needs.

4. Series of small teas for specific target groups.

5. Open house for the interested public, at the organization site, if possible. Include refreshments,
introductory speeches, and cards to be filled out by interested people.

6. Use "ad hoc" speakers' bureau to speak at other clubs and organizations.

7. Meet with existing groups to ask for volunteers (Stenzel and Feeney 1976).

Volunteer Selection

An organization must decide whether to set minimum criteria for new volunteers or to let anyone join. This will depend upon the function of the organization. The most rigorous selection procedures are found in specialized organizations, such as those engaged in social work (Aves 1969).

If an organization decides it will select only individuals with specific qualifications, it must set up a process to determine the candidate's education, intelligence, and skill to do a particular job (Aves 1969). This may be accomplished by establishing a committee to interview potential members and evaluate each candidate (Cull and Hardy 1974).

Volunteer Training

After new volunteers are selected, a period of orientation and training begins. Orientation starts with the
initial contact an individual makes with the organization. Training may involve many steps and be formal or informal.

The orientation phase acquaints the volunteer with the basic background of the organization's programs, purposes, services, and types of volunteer opportunities (Cull and Hardy 1974). This information should be basic and should give the new recruit a greater knowledge and enthusiasm about the organization (O'Connell 1976). Orientation is also a process of socialization, through which the "consensus structure" of the organization is transferred to the new generation of participants (Betz and Judkins 1975).

Orientation means being sure the volunteer becomes acquainted with the new setting and its lifestyle and the difference her/his job will make (Schindler-Rainman and Lippitt 1975).

Once orientation has taken place, training follows. All volunteers are entitled to some degree of preparation so they may perform their jobs efficiently (Aves 1969). The first step may be to select a trainer of trainers. This individual aids the trainer of volunteers in establishing programs and projects to aid in education of new recruits (Schindler-Rainman and Lippitt 1975). If an organization cannot support its own trainer of trainers, it might be possible for one group within a community to have someone who could help trainers from other organizations (O'Connell 1976).
Trainers of volunteers must develop programs to cover three specific areas:

1. Information.
2. Skills.

One of the most important aspects of training is knowledge about the volunteer's own work, which includes terms and conditions of service. In dealing with information, volunteers must also have information about the organization's methods of working. In addition, information about the clients served and the attitude of the community are important to volunteers (Aves 1969).

The second area, skills, deals with practical and human relation skills. Practical and organizational skills such as filing and typing must be discerned, as well as planning and evaluating, public relations, teaching, and training. Human relations skills include communication interviewing, working with groups, phone work, and working with officials. All of these areas must be touched upon so the volunteer knows what is required of her/him (Aves 1969).

Understanding, the third area, is extremely important. The trainer must help the volunteer to understand clients' feelings and be able to deal with them. Community attitudes must also be explored. The volunteer must
understand her/his own attitude and be able to deal with it (Aves 1969).

Methods of training can vary. The range of background and training needs of volunteers must be considered when establishing a program (Aves 1969). Training may include private study and/or group participation. It may be concentrated into a one-day program or cover a longer period. It must cover the elements of knowledge, skill, and understanding. Actual training will also include practice-discussion, role playing, group participation, and utilization of "old volunteers" to talk about actual cases.

After the volunteer has undergone the necessary training, it is important to follow steps to ensure retention of that volunteer worker. There are several ways to establish and maintain enthusiasm:

1. Draw up individual plans for each recruit.
2. Offer variety of jobs and opportunities for volunteers to do different jobs.
3. Have a place where volunteers can socialize.
4. Have on-going reciprocal evaluation.
5. Give volunteers positive feedback.
6. Find or create new areas of service for volunteers (Schindler-Rainman and Lippitt 1975).

Supervision and guidance of volunteers on the job is another important aspect of training. Supervision is
particularly necessary for volunteers who work with people (Aves 1969). A volunteer's learning experience must be guided by a more experienced worker, such as an "old volunteer." Supervision may be provided through giving advice, information, or constructive criticism, through discussion relating to facts, principles, or policies, or attention given to special problems or to the needs of clients. The role of the supervisor in this situation is to be a channel of information between volunteer and policy makers. By showing sincere appreciation and giving realistic assessment of the job being done, a supervisor can build the confidence of a volunteer (Cull and Hardy 1974).

Volunteer Motivation

Volunteers may terminate affiliation with an organization at any time without fear of loss of income or position. The organization loses a great deal when the service provided by a volunteer is no longer available. Thus, it is extremely important to motivate volunteers, keeping them active in their jobs and satisfied with their positions.

When a volunteer decides to continue to donate time, many things affect her/his decision. S/he may look at the way in which the organization is meeting her/his needs. Are there:

1. Appreciative feedback?
2. Problems with professional or supervising staff?
3. Disapproval or devaluation of the volunteer's commitment by others?
4. Good morale and working conditions?
5. A sense of "making a difference?"
6. Support of important people, such as family and coworkers?
7. A sense of fulfillment (Schindler-Rainman and Lippitt 1975)?

These are seven important considerations and an organization which realizes the need for continuing motivation will take steps to provide satisfaction to voluntary workers. Motivation must be an integral part of a working structure. By providing answers to the seven questions above, an organization is attempting to keep motivation of volunteers high.

**Funding Sources and Methods**

Money is necessary to purchase supplies and materials to run an organization, to pay for services, and to pay the salaries of the professional staff. Funds may be found in many places; this section will discuss techniques for raising money and explore the budgeting of funds which are obtained.

**Fund Raising**

The first task in fund raising is to determine the amount of funds needed and then develop a plan to meet the
need. Seven steps have been drawn up for developing a fund-raising plan:

1. Identify types of fund raising which can be undertaken.
2. Establish realistic goals for the first year.
3. Determine how many people are needed to raise funds. Divide jobs into individual ones.
4. Decide on a budget for the campaign.
5. Get the board of directors' firm support.
6. Recruit a chairperson.

While an organization is drawing up a plan for fund raising, possible sources of funds must also be considered. There are many sources:

1. Special gifts.
2. Community and family foundations.
3. Solicitations from businesses, groups, and door-to-door campaigns.
4. Special events.
5. Retail sales.
Most fund raising sources need little explanation. It is a matter of deciding what to do, planning a program, then carrying it out. However, foundation fund raising should be defined further.

A comprehensive book written by Allen and Buchdruker (1973) gives details on obtaining money from foundations. Major points to remember when attempting to obtain funds from foundations:

1. A well-written presentation.
2. A "track record" demonstrating ability to implement a program.
3. Explanation of how the original money was raised (from friends, relatives, community, individuals).
4. Knowledge of amounts of money the foundation normally dispenses.
5. Proper timing and a personal interview.

Types of foundations are numerous and an organization should be cognizant of the different types. These include general and special purpose foundations, corporation or company foundations, family foundations, and community foundations (Allen and Buchdruker 1973). Try to determine if a particular foundation would be more suitable than another for requesting funds. If so, efforts should be directed toward that particular foundation.
When requesting funds from a source, it is necessary to remember people, groups, or organizations being asked for funds should have certain information. Information which should be prepared for the edification of these groups include:

1. The goals of the organization.
2. The present programs and projects of the organization.
3. The future plans of the organization.

Budgeting

Budgeting is important because it directs the flow of funds. An organization, when considering a budget, should develop income and expense projections (O'Connell 1976). The income projection should be based on a practical and objective analysis of current sources of income. Expense projections should be developed initially by the executive director.

Several steps to be followed in preparing a budget for an organization have been suggested. There are nine steps which the budgeting committee should follow:

1. Budget realistically.
2. Have monthly reports which can be studied carefully.
3. Insist on accurate reports.
4. Get thorough understanding of the financial picture.
5. Establish a close-working relationship with the auditor.
6. Make use of interest and knowledge of the treasurer and finance chairperson.
7. Involve the in-coming president in forming a budget.
8. Provide some cushion in the budget.

Communication

Communication is an accurate exchange of information between organizational units or members. For an organization, communication can be viewed in two ways: communication within the organization and communication between the organization and the public.

Internal Communication

Internal communication is communication within the organization. Effective communication is important in the attainment of high levels of organizational effectiveness (Greenbaum 1974). The fact that many organizations do not specify communication policies can result in widespread ineffectiveness in communication with the general membership.

Organizational communication must be considered in terms of purpose, operational procedures, and structure (Greenbaum 1974). Its purpose is to facilitate achievement
of organizational goals. Operational procedures include the adoption of communication policies appropriate to objectives. Structural elements of the entire process include the organizational unit, a functional network, communication policies, and activities. All three factors must be working together to ensure efficient and accurate information exchange within an organization.

In evaluating an information system, an organization must decide where the communication network is breaking down. It must be determined whether loss of information, misuse of information, lack of information, or only partial information is causing the problem (Ecklein and Lauffer 1972). After deciding this issue a plan must be adopted to develop an effective system; people who will be using the system must be involved. Past information must then be reviewed and evaluated. The final step is the development of a plan for improving the system and a calendar for implementation.

Organizational communication can be broken into three areas:

1. Written media—correspondence, bulletin boards, house publications.

2. Hardware—telephones, dictation equipment, computer units.
3. Speech activities—interviewing, directing, conferring (Greenbaum 1974).

Ways to improve internal communication include publications or newsletters sent to all members, bulletin boards and posters within headquarters, and suggestion systems.

External Communication

Communication between the public and an organization is more detailed and involved. Communication includes direct mail, newsletters, and surveys. Before examining these factors in more depth, there are seven basic requirements for communicating effectively with various publics:

1. Acceptability of information—make adherence to fact a basic policy, scrutinize communication under consideration, and avoid set patterns or formulas for communication programs.

2. Compatibility between message and recipient's outlook—must be custom-made for each audience.

3. Intensity of impact of message—people are visual-minded as well as word-oriented; they become impatient with long messages and like an illustrative format.

4. Visibility which involves the person by making her/him a part of it—by action rather than words.
5. Pervasiveness of subject makes it a constant part of individual's diet of information and ideas--continuous flow of information; people will depend on information provided.

6. Variety of impressions rather than repeated impacts of the same sort--can use many channels to reach audience.

7. Persuasiveness of communications content--information must be credible, in the self-interest of the audience, and based on visible and meaningful action (Lesly 1973).

These factors must be considered a basic part of any communication with the public. If the above criteria can be met, an organization can be assured they are communicating with the public in an effective manner.

**Newsletters.** As a tool, a newsletter can be very important. The prime function of a newsletter is to keep a relatively select audience well-informed, and it is a very efficient way of reaching people (Haltje 1974).

Newsletters can be used for direct mailing, for personal hand-outs, or inserted into other publications according to **Industrial Distribution.** It must be informative to keep people abreast of what is happening (Caplan 1975). Each issue may contain a feature about a particular accomplishment of a member of the organization; this helps to build an image of the organization. Each issue must add something to
the reader's knowledge, or they may stop reading it (Haltje 1974).

A newsletter may fulfill an important function for an organization, but the literature is very sparse in describing how one should be done efficiently. This researcher did not find information on how to organize a newsletter or the type of format to use. If an organization is to employ a newsletter, information should be available to help a group create a newsletter to serve its purposes.

**Direct Mail.** Another communication tool is direct mail. A mail list is often used for solicitation of money or to inform the public about an issue or event according to *Industrial Distribution.*

Guidelines have been established to help an organization build and utilize a mail list:

1. Mail lists can be bought, rented, or made up by the organization.

2. A file should be developed of all interested editors who want to receive news about the organization.

3. Mail lists must be updated every year.

Once a mailing list has been drawn up, it can be utilized for many purposes. But using direct mail is expensive, and an organization must decide when its benefits exceed its costs.
Surveys. Surveys can also be an excellent communication tool. If utilized properly, a survey can be viewed as two-way communication: it can create an interest in the organization while at the same time surveying the public. There are different types of surveys which can be used: mail, telephone, personal interview, and product surveys.

Before a survey is undertaken, the organization must decide what information it wants and then develop a plan to efficiently gather this information. After a plan has been decided upon, a committee should be organized to conduct the survey according to Business Week.

Results of surveys may be for internal use or for public consumption. In either case, the results should be presented to the general membership in a clear, concise report states Business Week. Internal evaluation of the results may be presented in a newsletter, as a special report, or as a topic of discussion at a meeting. Surveys for public consumption may be made public through the news media, either on television or radio or in the newspaper according to Business Week.

Conclusion

There are many different facets of organizational structure and operation which contribute to the success or failure of an organization. The literature review was an
attempt to cover these different aspects; unfortunately, there were few sources dealing with some areas.

No one book or article covered all five aspects of organization as described in this paper. This researcher did not find any single source which addressed itself to all the concerns of a voluntary organization.
CHAPTER 3

SURVEY RESULTS

General Information

An attempt was made to represent the efforts an interested consumer might make to obtain information from various people that s/he made contact with after attending some consumer conferences. Leaders of voluntary organizations and voluntary consumer organizations were consulted for information on establishing and running a voluntary consumer organization. A selective sample was drawn from rosters of people who attended two national consumer conferences, the annual meeting of the American Council on Consumer Interests, and a national workshop sponsored by Consumer Federation of America. People were chosen from these two lists for the specific purpose of providing information on establishing an organization. They included educators, administrators, consumer activists, and consumer professionals.

Many national groups which deal specifically with volunteers and voluntary organizations were also contacted for information. A total of seventy-four letters were mailed to this sample; replies were received from sixteen.
This sampling is not to be considered scientific but should be viewed as an attempt to gather information in a systematic way.

The results were less than expected only because much of the information received was so brief. It seems that most working voluntary consumer organizations have no established methods of operation. There are no manuals to guide an organization in establishing goals and programs. This reinforces the position that most voluntary consumer organizations have not organized with the aid of a model and may, as a result, have overlooked problem areas while organizing. The information provided was probably typical of the information a consumer interested in establishing an organization would receive.

There is no established list of volunteer organizations or consumer organizations. There is no directory of leaders in either field. The people and organizations contacted were those names and addresses available to the general public.

The organizations which responded to requests for information sent literature dealing with many different areas including principles of effective management, recruitment of volunteers, fund raising, planning volunteer programs, press releases, and newsletters. Each of these areas will be discussed, and an in-depth study will be made
of the different methods organizations employ. The five major divisions which cover the above information are:

- organizational dynamics
- organizational structure
- volunteer recruitment, selection, training, and motivation
- funding sources and methods
- communications

Organizational Dynamics

"Organizational dynamics" has previously been defined as the intangible, internal workings of an organization. In the last chapter planning, leadership, and evaluation were described as the three significant areas of organization dynamics. Information was found in the review of literature which covered these specific topics. The information reported in this chapter, which was received from organizations and their leaders, is less comprehensive. Planning was covered by two organizations, while leadership and evaluation were not dealt with at all.

Planning, leadership, and evaluation are basic foundations for an organization. A nucleus consumer group, receiving no guidelines for these areas might find it difficult to build a successful and stable organization.
Planning

The Paul Douglas Consumer Research Center of the Consumer Federation of America has published a pamphlet which suggests eleven principles for running an effective consumer organization:

1. Be opportunistic.
2. Seize the initiative.
3. Diversify.
4. Keep forces mobilized.
5. Have a broad base.
6. Don't over organize.
7. Delegate responsibility.
8. Don't compromise principles.
10. Cultivate the press.
11. Know your politicians.

These eleven principles imply that a volunteer consumer group must be flexible and innovative. To be effective, an organization must be an influential part of the community. To be an influential part of the community, the organization must be on the scene and involved in the issues of the day.

When an organization plans a course of action, the action must be evaluated in terms of eight points, according to the Midwest Academy. These are:
1. Is the timetable of the action internal or external?
2. What are the legal constraints?
3. What is the relationship between the organization and the "enemy?"
4. Will the action attract allies who have a common interest or goal?
5. What is the inherent power of the action?
6. What is the permanence of the result?
7. What resources does it require?
8. What reaction does it elicit from the opposition?

What forces are put into motion?

Keeping these criteria in mind, major categories of action may be explored. These categories include boycotts, law suits, direct action drives, propaganda (public education) campaigns, and service projects.

Boycotts function to withhold something from the institution designated as the "target." They can be considered a form of community strike where money or participation is withheld. Rent strikes are an example of boycotts. The boycott must be examined in light of the above eight questions, to determine whether it is the correct course of action to be followed.

Another category, legal action, includes court proceedings against individuals, corporations, and government
agencies. Action can be taken on behalf of an individual or a large number of people, the latter called a class action suit.

Propaganda campaigns stress education. The term "propaganda campaign" covers a wide range of activities. Media usage, research, the writing of position papers, teach-ins, and newsletter articles are all part of the "education campaign." These activities may take three forms:

1. An adjunct to an immediate on-going action.
2. Specialized organization which does research and publishing.
3. A component in a broader issues program being conducted by an organization.

The service project may also take one of many different forms. It can be used as an adjunct to a broader program or as an end in itself. It is not uncommon for an organization to begin a service project as a tactic and then allow other activities to fall off, leaving the service as a major area of work.

A service project, like an educational program, requires a small group with some specialized skills and low capital investment. Service projects can quickly become popular for there are always people who need help.

These criteria have been developed to help an organization decide the best course of action to help solve a
particular problem. If one tactic does not work, another may be tried.

**Organizational Structure**

"Organizational structure" has been previously defined as the tangible framework of an organization and deals with its actual structural composition. In the literature review, organizational roles were discussed extensively, including the roles of an organizer, the president, the board of directors, the executive director, and a professional staff.

No directly-applicable information was received from existing organizations or leaders concerning organizational structure. No organization sent literature on organizational make-up, leaders, or structure. The only information received concerning this area was a handbook which very briefly describes the ACORN (Arkansas Community Organization for Reform Now) model.

Very little information was available about this format, but basic guidelines were found in *Community Organizing: Handbook #1*. The aim of the ACORN model is to help create a group "from scratch"; ACORN does not build coalitions or congresses of existing groups. The organization itself is the cornerstone of the ACORN model. Developers
of this model feel each organization must be built from the
ground up by members.

Organizing members attend the first meeting where
they meet with an organizer and choose a neighborhood in
which to begin establishing the organization. The orga­
nizer is an ACORN organizer from another city in the area for
the express purpose of helping to organize a group. ACORN
believes that by participating in the organizing from the
beginning, the members will feel they own the group and will
be committed to seeing it succeed.

After deciding upon the neighborhood, the organizer
searches out contacts in the selected area. This may be
done through contacts with churches, labor unions, and other
groups.

Next, these contacts (ten to twenty couples in a
neighborhood of one thousand homes) develop a set of issues
which are felt to be of interest and importance to the
neighborhood. During this time the organizer is "selling
the committee" on the importance of ACORN.

Once the initial set of issues has been developed,
other people in the neighborhood are contacted by letters
which explain the organization and its plans. Next, per­
sonal visits are made; a team of volunteers explain ACORN,
the issues and actions of the organization, and answer ques­
tions. Goals of this door-to-door contact are to legitimize
and personalize ACORN, to attract new members, to explain basic concepts, and to get people to attend the first general meeting.

Volunteer Recruitment, Selection, Training, and Motivation

Volunteers are an important part of a volunteer organization. What type of volunteers can an organization expect to find? Information from the Agency for Volunteer Service (ACTION) sent results of their statistical study on volunteers in the United States in 1974. This information was used to develop a profile of the American volunteer.

The typical American volunteer is a married, white woman between the ages of twenty-five and forty-four, with a college degree and from an upper income family. But the survey shows that all strata of economic, educational, and social levels are represented. Twelve percent of those who live below the four thousand dollar income level donate their time and even seventeen percent of the unemployed do volunteer work. Thirty-seven million Americans over the age of thirteen donated some of their time, energy, and effort to a cause in the year ending April 1974. They averaged nine hours each week in their programs.

These factors need to be considered when developing a program for recruitment. If an organization wishes to
reach many income, educational, and social levels, different programs will be needed to reach different groups.

Information received from organizations on volunteer recruitment was not great in volume but very detailed. Two comprehensive articles were received which dealt in depth with ways to plan and implement volunteer recruitment campaigns.

Unfortunately, no literature was received on volunteer selection, training, or motivation, although these three areas are of equal importance. Recruitment of volunteers is essential to a voluntary organization, but selecting, training, and motivating these recruited volunteers is also important. Without guidance, these areas could be overlooked.

Recruitment

Volunteer recruitment is an essential part of any organization supported by the efforts of volunteer members. If carried out in an organized, planned way, volunteer recruitment can ensure an organization support from many workers.

The National Center for Voluntary Action publishes a journal, *Voluntary Action Leadership*, which covers many aspects of volunteerism. Included in the Summer, 1977, publication is an excellent article on recruitment of volunteer
workers. Written by Carol L. Barbeito and Robert Hoel, it deals with the "target markets" of volunteers.

There is a growing public recognition of the spirit of volunteerism as a unique aspect of American life. Unfortunately many Americans have been left out of the volunteer movement, and organizations are now trying to recruit them. Marketing techniques used by many commercial firms may be the answer. According to Phillip Kotler, a leading marketing expert, marketing is the "analysis, planning, implementation and control of carefully formulated programs designed to bring about voluntary exchanges of values with target markets for the purpose of achieving organizational objectives." This definition seems compatible with the concept of an effective volunteer recruiting campaign. A well-planned program is better than attempting to recruit volunteers from wherever they can be found.

One practice of marketers, the article explains, is to divide the mass market into specific population subgroups. These are called market segments; each market segment is studied separately. Potential volunteers are a diverse group, and different programs may need to be developed to reach each market segment.

The organization must next assess its current recruiting program. It should examine recruitment objectives and resources. A look should also be taken at the
organization's volunteers—who volunteered, how they were recruited, why they volunteered. Inferences may be drawn from this data as to the market segment which has already been tapped.

Next, the organization must identify the various market segments existing within the community. It must be determined why different people want to volunteer, what rewards there would be for them, what is done with their potential volunteer-time now. Actually talking with people may best answer these questions.

After gathering this information, the organization is ready to plan its new recruitment program. An organization cannot expect to reach all market segments, so a particular market segment must be chosen as the target group. After a target group is decided upon, a tailored plan for recruitment is developed.

This plan includes many steps. First, volunteer jobs must be presented to the target market, including the variety of jobs, the quality of experience offered, and the back-up support services provided by the volunteer. These should be presented in a way which make the potential volunteers feel working with the organization would benefit clients and themselves.

The next area of consideration is "logistics"—location of volunteer recruiting offices and volunteer jobs
to the market segment, the territorial boundaries of coordinators, and the organizations cooperating in volunteer recruitment.

After developing a plan which encompasses these areas, a schedule of implementation is necessary. Program execution must be monitored and evaluated to determine if it is meeting objectives. The end result will be "greater effectiveness in attracting both traditional and nontraditional volunteers."

In another approach, the National Information Center on Volunteerism feels the first step in recruitment is to determine why an organization wants volunteers and what will be done with them. Once the number and types of positions have been determined, a written job description should define the type of volunteer needed and will help direct recruitment efforts. "Selective recruitment" attempts to find volunteers to perform specific jobs. A more general recruiting is used when an organization needs a large number of volunteers to do tasks that require either common skills or a wider variety of skills. This appeal is usually generated through mass media appeal, such as television, radio, or newspapers.

These recruiting ideas emphasize predetermination of the need for volunteers. A basic, workable plan must be developed which can be utilized to recruit volunteers.
A volunteer program must be planned so an organization can maximize the effectiveness of its use of volunteers. The Center has five guidelines which can help make a plan efficient and effective.

A first assessment must be made to determine the number and nature of volunteers presently affiliated with the organization and whether current needs are being fulfilled. Through investigation, an organization can identify needs to be met and recruit the right volunteers to fill specific positions.

A second area to be investigated is specific goals and objectives of the organization. If additional volunteers can help to meet objectives and goals, the organization must decide whether they should be recruited.

A third step is to consider additional needed resources which are available. A new budget may have to be drawn up or a new plan for procuring additional resources may have to be developed. A preliminary plan for functions such as orienting staff to volunteers, volunteer job design, recruitment, selection and training of volunteers, and evaluation must also be developed.

A time target for achieving goals should be the fourth step. This plan can be modified if the need arises, but it is necessary to establish some time plan to aid in
evaluation, the fifth step. A design for evaluation must be built into the plan.

A volunteer recruitment planning process may take from three to six months. This time must be allocated so the program may be dealt with effectively.

**Funding Sources and Methods**

Much information was received from many organizations on funding sources and methods. Fund raising seems to be an important function for most organizations. Information ranged from broad principles to specific project outlines for raising funds.

It was interesting that no organization sent information regarding budgeting or handling of funds. The only information received dealt with raising money, not spending it.

**Fund Raising**

Information received from the National Information Center of Volunteerism offers two principles when deciding where and how to raise money. First, an organization must know exactly how much money it needs and why. Secondly, it must consider alternatives to dollar contributions, such as donations of materials, equipment, facilities, or time. The more capital an organization can raise, the less money it will need. An additional benefit of raising capital
equipment is being able to prove success in raising in-kind contributions on the merits of the program.

Three major types of funding sources are available and should be considered. These sources are community fund raising, grant applications, and self-sufficiency (fees for services).

These ideas from the Information Center are basic and essential to any fund raising attempts. All sources for obtaining contributions must be explored in a systematic way.

A general view of funding sources is proposed by Robert Creamer. In his article for Midwest Academy, he examines four ideas for raising funds:

1. Systematic planning is a necessary part of fund raising.
2. Each potential source must be contacted and convinced helping the organization is beneficial.
3. An amount reflecting the source's ability to provide funds should be requested.
4. A committee should be established to take responsibility for these contacts.

Potential sources for fund raising are many and varied, the article explains. Large, lump sum donations might be solicited from foundations, churches, or institutions
which have an interest in the goals of the project. Smaller amounts may be solicited from small groups or individuals.

There are many methods which can be employed to raise funds for an organization. Several self-sufficient, repeatable fund raising programs include:

1. Dues and/or affiliation fees.
3. Benefits (including weekly bingo games or annual carnivals, dinners, dances, etc.).
4. Raffles.
5. Systematic speaking programs for honorariums.
6. Direct mail.
7. On-going institutional support.
8. Door-to-door solicitations.
9. Contracting for research or consultation.

These ideas on raising funds have one point in common. To raise money, an organization must have a plan which lays out the steps to be taken, the time in which the task is to be accomplished, and who will do it.

The Summer 1977 issue of Voluntary Action Leadership, published by the National Center for Voluntary Action contains an informative article about raising funds for Houston's St. Joseph's Hospital. A benefit performance, with top stars, is held annually and the proceeds donated to the hospital.
To stage the event, planning begins eleven months in advance. First, the group meets and critiques the last affair to see if all objectives were met, if problems developed, or if changes are needed. The steering committee sets policy and assists in establishing the budget, working out a timetable, and enlisting volunteers for the next event.

The show is held in February, and the publicity campaign begins in August with items in the society columns. In September the show's stars are announced. The volunteer's kick-off party is covered in October. From November to February, features are run in the paper on the chairperson and other prominent persons helping to arrange the show. In January, advertisements are run in the Sunday newspapers.

Although staging an event like this is not common for most groups, examining this operation is beneficial because it establishes guidelines for holding a "special event." For success, there must be intelligent planning, a capable chairperson, a hard-working committee, plenty of time for preparation, and effective publicity.

Communications

Communications is a general term applied to many different areas of public contact. These contacts include broadcasting, radio spots, flyers, doorknocking, press releases, brochures, and newsletters. Communication may be one of the most important areas in which an organization
is involved. If a consumer organization depends on public contact for cases or issues of involvement, being known to the public is an essential part of its operation.

A consumers' Manual, by the Consumer Affairs Committee of the United Auto Workers Union, states communication "means getting information to people so they will use it." The manual establishes general guidelines to follow to accomplish this task:

1. Be clear what you want people to know.
2. Know what you want them to do after they understand the message.
3. Know who you want to reach.
4. Make the message easily understood.
5. Distribute messages to the target group.
6. Suggest what people can do and how they can do it.
7. Use the most effective way to reach the people you want to contact.

Radio Spots

The National Center for Voluntary Action's Summer 1977 issue of Voluntary Action Leadership contains an article by Alan Labovitz on the radio spot as a means of communication. Radio is excellent in reaching many diverse groups in many areas and can be very intimate for communicating an idea to a large audience in a personal manner.
Planning is an essential part of any media communication. When writing a radio spot, be aware radio messages can be divided into four parts:

- getting attention
- pointing out a human need
- showing how an organization can help to satisfy that need
- asking for action

Labovitz further suggests eight steps to be considered when developing and writing a radio spot:

1. Think of one idea per spot.
2. Use thirty second spots.
3. Use a positive approach.
4. Do not begin with a question.
5. Keep it conversational.
6. Use short, simple sentences.
7. Use station recommended formats.
8. Read it out loud first.

By following these eight steps, a radio message can be well prepared, allowing an organization to successfully reach the target audience.

Many methods of reaching the public have been developed. Community Organizing: Handbook #1 discusses several additional ways to reach the public.
Flyers

Using flyers (handbills) is one way to communicate with large numbers of people. Flyers do not need to be expensive; they do not have to be flashy to catch someone's eye. They should have something to say and should be made convincing.

When making flyers, it is wise to use colored paper; it is more eye-catching. If printing is difficult, portions can be typed. The day and date of an event must be mentioned and it should be concise. The name of the organization must be clear, with prominent logos and important phone numbers included. The wording must be absolutely clear so mistakes and confusion can be avoided.

Doorknocking

ACORN uses personal visits to contact people. They use the term "doorknocking" when referring to these personal visits. Doorknocking is a process of "listening, persuading and asking."

A doorknocker represents the organization and must accomplish a great deal in the span of a few minutes. The impression of a democratic, effective organization should be created by the doorknocker. An organization which uses doorknocking makes visits for a purpose and should have an agenda. The visit should be short, concise, and meaningful.
Press Releases

A third area of publicity is the press release. Information from ACORN about press releases discloses that the effective use of the news media can be an important organizing tool for any group trying to reach a large audience. It can play a key role in building an organization and its future effectiveness and strength.

Different types of press releases have been developed for use with different media. These releases include public service announcements, advance releases, reaction statements (for use after decisions have been made on particular issues), releases on a proposal or statement of the organization, and news stories.

Certain tips should be kept in mind when writing press releases:

1. Time is of the essence.
2. Quote spokespersons.
3. Attach prepared statements.
4. Feature the name of the organization.
5. Include the name and phone number of contact people within the organization.

Newsletters

A far-reaching, effective way of communicating ideas, programs, issues, and news of general interest may be through a newsletter. Newsletters may deal with information
about the organization or deal with a specific issue or be a combination of both. Many organizations use newsletters to keep members informed and to reach new people.

One example of a newsletter was received from the Newark Office of Consumer Action. Their newsletter Consumer Memo is printed in both Spanish and English, reaching a larger and more diverse group of people than a newsletter printed in one language.

In the Newark newsletter only budgeting was dealt with. Ideas were given on stretching money; sample budgets were included and guidelines were established for planning and using a budget.

The United Auto Workers Union also employs a newsletter entitled Administrative Newsletter. This publication, received from the UAW, deals with informing the members of the union about the newly established Department of Consumer Affairs. The issue dealt with only one topic, but this is not the only format. By offering articles on different topics and news on happenings within the organization, a great deal of information can be disseminated through a newsletter.

Brochures

People often pick up interesting, informative brochures which deal with their problems. Brochures or pamphlets can be a good way to let consumers know what an
organization is doing and how it can help them. The information contained in a brochure may inform, amuse, interest, and intrigue a reader.

Many consumer organizations are involved in providing information to the public via brochures. Informative brochures about organizations were received from many agencies, along with brochures dealing with specific services, issues, and problems. Some brochures dealt with used cars, utility rates, shopping, or budgeting hints. Others dealt with action-help lines, consumer legislation, and other issues of importance.

All the brochures have one point in common—they are concise. Each brochure deals with only one problem, issue, or idea. The brochures are informative and easy to understand. They acquaint the reader with one idea and provide information so the consumer knows what action s/he may take. Names and phone numbers of the organization are prominent.

Conclusion

Each consumer organization which responded has different methods of operation which it employs to solve problems, deal with issues, and reach the public. The literature received represents only a small portion of consumer and volunteer organizations. The information might help a volunteer consumer organization set up a program and
operation, but more data would be needed to help the organization run efficiently and effectively handle issues. A model for a local volunteer consumer organization, such as the one proposed in this study, would provide the information a fledgling organization would need to build a solid foundation and begin operation.
CHAPTER 4

THE MODEL

Since the beginning of the Twentieth Century, American consumers have felt the need to speak out to make their problems known. During these seventy-five years, many attempts have been made to establish consumer-oriented organizations, but few have succeeded in a continuing capacity. Organizational work has been done by local groups which form to fight for specific issues and remain together, without formal plans or goals, to further the cause of the consumer. These consumer groups have moved in several directions. Some groups act as lobbyists; some conduct only research; others act as mediators between consumers and business people. Some perform all three functions.

For this model, we will assume a group of about six to eight people unite because of a common concern, then decide to stay together. This model will first cover general information and then five specific areas—organizational dynamics, organizational structure, volunteers, fund raising, and communications: the model will be broken into three phases of development.
General Information

There are several areas of concern: the people who make up the organization, the name of the organization, where and how it will be headquartered, and the phases of organization. These need to be covered to give more understanding about the organization.

The people who form the organization (the nucleus group) should be interested, concerned consumers who feel the need to be creative in their solutions to problems. If they cannot find satisfaction through existing channels, they seek new means to solve their problems. This nucleus group must be innovative and action-oriented to develop and carry out programs and projects. They will need to be cautious in carrying out their plans because there may be a tendency to proceed without planning the directions they will take.

Although the group will want to become active, they will need to take time to plan goals, programs, purposes, and projects. This may be difficult, but the organization needs a solid foundation if it is to succeed.

The nucleus group must decide where and when they will meet. At this formation stage, and through the first phase, the group should meet weekly. Meetings should be held at a member's home or a convenient place for all, such
as a local church. If some members work, then evening or Saturday meetings may be necessary.

The nucleus group must decide upon a name for the organization. The name should let the public know what the group is involved in. A name which is action-oriented and provides an image of dynamism is a good choice, such as Consumer Action Now or United Consumers.

The group will need to have a base of operation, whether it be in someone's home or office or in an office of its own. The ideal situation is to have an office for the organization because of the stability and permanence it lends. But without funds that is usually not feasible. Locating the files and other paperwork in the home of the president or secretary is probably the best solution. As the organization grows in size and stature, a separate office may be needed. At that time, the organization, as a whole, must decide when and where to move. Until then, advantage should be taken of any facilities at its disposal.

The life cycle of an organization includes four stages:

--planning
--implementation
--continuity
--decline

This model will cover the first two areas in depth and touch briefly upon the third. Planning will be covered in the first phase and implementation will be dealt with in
the second phase. Continuity will be described at the end of the model.

The first phase involves the nucleus group in the planning of goals, objectives, policies, issues, programs, and projects in which the organization will want to become involved. Some action will be taken, such as recruiting new members and raising funds. This phase will last only as long as it takes the nucleus group to accomplish the objectives and goals they set for themselves. An average length for this first phase may be six months to one year.

The second phase, implementation, is an action-oriented phase and may take longer than the first. This stage deals with actually putting the organization projects and programs into operation, evaluating the results, and making changes that are necessary. This phase will not have a calculable length of time because there is no clear distinction between implementation and continuity stages. Continuity is the perpetualization of projects, programs, and policies the organization is involved with; the organization slowly moves from an implementation into a continuity phase.

The important point to remember is that each organization is unique and must set up its own timetable for activation of different phases. Some groups may be able to accomplish tasks more quickly than others—what is important is the organization's readiness to move into new phases.
Organizing takes time; to do it well may take longer than a group realizes. Do not rush through the phases or the organization may not have a strong foundation upon which to build.

The First Phase

Organizational Dynamics

Planning. Planning must be very general. The group should avoid drawing up an organizational chart or deciding whether to employ a professional staff at this point. According to O'Connell (1976), the main function of planning is to provide a foundation for the organization to effectively begin operation and become established within the community. If the first phase is spent on matters which are not forward-moving, the organization may never accomplish anything.

The first step of the planning process is a meeting of the nucleus group to decide the goals of the organization. These first goals include long-range and short-term goals. Long-range goals are the general aims of the organization—the purposes of the organization and how the organization will attempt to meet these purposes.

Short-term goals are goals which can be accomplished in a shorter period of time. At this point, they should number three or four, be of interest to many people, and be attainable without a great deal of manpower, money, or time. Goals which are general will help to attract new members.
These goals are not necessarily action-oriented because of the need to spend time organizing the group.

John DeBoer (1970) feels the decision-making process is also an important part of planning for the organization. The decision-making process includes:

1. Defining the goal.
2. Seeking methods.
3. Selecting one method.
4. Implementing the selected method.
5. Evaluation of action.

When an organization plans a program or project, each of the above five steps must be considered. Defining a goal (such as an educational program) is the first step, exploration of methods follows. The first three steps must be carried out at this beginning stage so the organization can develop an intelligent plan, based upon consideration and research. Implementation and evaluation will be carried out at a later time.

At any point, conflict may arise and members may disagree about the running of the organization, forming policy, voting, holding elections, or any other aspect. Members must be ready to deal with conflict. According to Robert's Rules of Order (1971), a constitution and a set of by-laws can be a way to resolve conflict. These two documents create a concrete, orderly way to resolve disputes; by
establishing rules to run the organization at the beginning, members will be able to refer to them to provide answers to questions and solve problems.

Members must be familiar with the constitution and by-laws as problems arise. But it is up to the people involved to use means available to them to resolve disputes.

**Constitution and By-laws.** A constitution will concretely establish the object of the organization. It will create a system of fundamental laws for the organization. According to the revised edition of *Robert's Rules of Order*, the nucleus group should develop a document which contains:

- name and object of the organization
- qualifications of members
- officers and their elections
- meetings of the organization
- how to amend the constitution

*Robert's Rules of Order* also advises the group to develop a set of by-laws: these are secondary, specific laws for use by the organization. By-laws establish voting procedures, terms of office, rules of order, and specific time requirements and operational procedures for the organization. The creation of these by-laws will help to resolve problems and provide guidance in the future when members of the organization disagree over certain issues.

A word of caution at this point is necessary. The nucleus group must not become so involved with creating a constitution and writing a set of by-laws that it cannot
carry out its other functions and duties. These documents are to help the organization—by devoting too much time to them, the nucleus group can keep the organization from going any further toward becoming operational.

Leadership. When the nucleus group meets, one or two people will emerge as "natural leaders," according to Kenneth Benne (1948). First leaders are often movers; they are most interested in seeing the organization become involved in issues and programs. They expend their energies in working with members and organizing plans, programs, and policies.

First leaders must be aware of the problems and disappointments they will face. Organizing a group of people is difficult in itself, but getting the organization moving can be frustrating. One aspect of a first leader may be the ability to ignore details and concentrate on generalities. At this beginning point, a leader can become ensnared if s/he pays too much attention to details. Details can be important, but the general issue is more important.

Success in handling a problem or success in developing a general plan can be a great morale builder for the organization, according to G. Lippitt (1955). A first leader may aim for such success, leaving minor details to be dealt with later. This is not to say first leaders should not be
concerned with details, but they must not become the most important part of a program. Once the program has become operational, attention to detail may aid the organization in the next phases.

The main point is that first leaders must be more concerned with getting the organization involved in different projects so members will be positively reinforced with the accomplishment of goals and aims. Such reinforcement benefits the entire organization.

**Evaluation.** Evaluation must be an integral part of the planning process because it helps members see what has been accomplished. Brian O'Connell feels evaluation by members may need to be incorporated into a monthly evaluation report. For this first phase, the nucleus group should meet weekly; evaluation of what is happening within the organization should be done at every meeting. This will help members stay abreast of changes in plans or the need to re-evaluate and change programs at some point.

Evaluation will help inform new members of the types of changes going on within the organization. At these weekly meetings it is good to encourage everyone to take part in evaluation. New members may have unbiased opinions which would benefit the organization.

Weekly evaluation should include goals and aims, as well as more specific areas such as programs and issues. A
goal established by the nucleus group may not be feasible, and re-evaluation of all parts of the planning process will help illuminate problem areas.

After a period of time, meetings may not have to be held every week. If the organization meets every two weeks or twice a month, evaluation will still be an important aspect. At this point, people in subgroups should be working on different aspects of the organization and informing other members about what is happening in their areas; this will keep everyone aware of accomplishments and changes. When they are sharing with the group, evaluation of their projects may be beneficial.

As the group becomes larger and committees are established, evaluation within committees will be very important. Evaluation by the whole group will only be needed for major changes or additions to already-agreed-upon programs.

The evaluation process must be an integral part of the organization, whether it is evaluation by the entire group or by a committee as the group becomes larger. During this first phase, a constant re-assessment of each situation is needed so members may gain experience and knowledge from both successes and problems.

Organizational Structure

President. The first president will probably be chosen from among leaders who emerge when the group is in
the formative stage, states J. Ecklein and A. Lauffer (1972). S/he will be enthusiastic and dynamic and her/his main function is one of motivation and reinforcement. This leader must motivate the members of the organization to do their jobs and then must reinforce their importance to the organization.

The president's job will be to lead the organization, to direct programs and projects, but there will be other tasks of equal importance. A board of directors and certain committees must be decided upon, and it is the responsibility of the president to lead members toward these goals.

The subject of a board of directors should be discussed at meetings during the first month or two. Led by the president, the entire group should be engaged in this process. The president must also guide members in the establishment of needed committees. In this first phase, it will be easy to involve the entire group in this process.

Another task of the president is to aid in the recruitment and motivation of volunteers. The first president must be more active in this area than leaders who follow. Since the initial group will be small, everyone must be involved in recruitment and the president must be very visible. People may identify the organization with the first president, so s/he must be aware of this.
In motivating volunteers, the president must be involved in all aspects of the organization's programs so her/his presence can be felt. By keeping in contact with members, it is easier to encourage them, and this often leads to cohesion within the group.

As coordinator, the first president must attempt to keep all the different programs of the organization in harmony. S/he must see that although the groups are engaged in different activities; these activities are not at cross-purposes or repetitious.

Selection of a secretary at this beginning stage will aid the president and the organization. By having someone responsible for keeping records and organizing details, the president is free to be involved in more important matters. It is also good to have an accurate record of events as they occur for future reference.

Another aspect of the president of this first phase which may be overlooked is the need to have a leader who is a "cheerleader and parent-figure." David Jenkins (1956) feels the organization's attempts, accomplishments, and failures must be applauded because of the efforts by members. The "parent-figure" enters the picture when morale is low and members must be reassured they are doing a good job. Extra encouragement and attention may be needed for members when things are not going as planned. Positive
personal contact helps to encourage many low spirits. The first leader must realize this as a responsibility.

**Board of Directors.** The size of the board of directors and its duties should be discussed and defined by the membership in this first phase, according to Cyril Houle (1960). Interaction of the board of directors with certain committee should also be considered for implementation at a later date.

Once the duties of the board of directors have been decided upon, the group should take time to consider who shall serve on the board. People with special qualifications should be considered for particular positions.

The board of directors is usually made up of those members who have proven an interest in the causes of the organization. Since the nucleus group is in the formative stage, everyone involved has shown such an interest so everyone may be considered for board positions.

Responsibilities of board positions must be clear to everyone and terms of office must be established. It is then up to the members to decide who shall serve on the board.

When the organization is just beginning, the duties of the board will be few. The board will establish some policies, but since there are only a small number of members,
it will probably be necessary for all members to help carry them out.

Commitees and Chairpeople. At this beginning stage, committees should be established only to fulfill specific needs. Committees which are formed at this stage include a fund raising committee, a volunteer recruitment committee, and various planning committees.

According to Duncan Black (1958), planning committees are groups which draw up plans of operation for future action; examples are education and dispute handling committees. These committees form to gather resource material, establish operational procedures, and plan courses of implementation. They do not become active at this point; they are building a foundation for their operations. Once the organization has enough money and manpower (usually the second phase), there may be implementation of one or all of the special programs.

Organizers must remember that only committees which are essential to operation should be formed at this point. Planning committees should be established, but the greatest amount of effort must be directed to the active committees, such as fund raising and volunteer recruitment.

Chairpeople must be chosen to lead the committees which are established. People who are specially qualified should be considered for leadership positions. It is
important to realize everyone may be involved in serving on the board of directors, as chairpersons and as members of committees in this beginning stage. One reason to keep the number of committees to the barest minimum—members may not have time to serve on many committees.

Volunteer Recruitment, Selection, Training, and Motivation

**Volunteer Recruitment.** Volunteer recruitment may be the most important aspect of the formation of a volunteer consumer agency. If there are no volunteers, there are no programs.

According to Geraldine Aves (1969) three methods of recruitment must be considered by the volunteer committee:

1. Self-recruitment.
2. Informal recruitment.
3. Formal recruitment.

Self-recruitment is volunteering on one's own initiative. This may be encouraged by publicizing formation of the group, creating an interest among people, and having the citizen come forward to volunteer. This is a difficult way to reach new volunteers and should only be used in conjunction with other programs.

Informal recruiting is reaching potential volunteers through people who are already members. "Member getting member" is one method of recruitment. If each member can
sign up one new member, the organization doubles in size. Contact with members can raise awareness levels of others. Members who are enthusiastic about what they are doing and what they hope to do can attract interested people. This is one reason why the organizers must not get tied up on projects that can be put off until later; enthusiasm is needed and projects which are not essential can be boring to everyone.

Informal recruiting projects may take many forms:

1. Member recruiting member.

2. Members meeting with already existing groups, recruiting new people from these ranks.

3. A speaker's bureau to speak to interested groups of people.

Formal recruitment follows more traditional patterns. Registering with the local Volunteers Bureau is an important step. These bureaus direct people with specific interests to organizations. Placing announcements for volunteers in local newspapers may also attract new members.

Recruitment of students from local high schools or colleges is also an important consideration. Students tend to be enthusiastic and energetic with new ideas; they can add a great deal of spirit to an organization's programs and projects.
The number of new members an organization seeks to attract depends on the individual group. An organization should not be so overwhelmed by the number of new members that it cannot achieve the basic goals it establishes for itself. At the formative stage, it may be a good plan to attract only as many as twice the number of organizing members because of the difficulty in managing more people. This means each organizing member would need to be involved in the training of two new members. Training more volunteers than that could interfere with policies and other plans.

Selection. In the early stages, selection of volunteers will probably not be necessary. According to B. O'Connell (1976), it is important to attract as many interested, diverse people as possible to give the organization balance. People who volunteer usually do so because they are interested in becoming involved in the activities of the organization; interest as well as a willingness to actively participate are probably all that are needed of new members. If later the organization becomes more specialized, then selection procedures may have to be established.

Volunteer Training. Orientation is the first step in training new volunteers; it acquaints new members with the basic background of the organization's programs, purposes, and services. A. Stenzel and H. Feeney (1976) state in
this first phase, orientation and training may be combined and carried out in an informal manner. Orientation and training will probably mean acquainting new members with the goals, purposes, procedures, and projects of the organization. It is important to remember that at this stage of organizing, socializing new members to the goals and aims of the organization will be a major part of the training.

New members should be assigned to committees to become familiar with the different aspects of the organization. They should also be encouraged to participate in general meetings, offering opinions and comments. Even though new members will not have the insight of organizing members, they may be less biased in their opinions.

Formal training programs may be needed if many new volunteers are recruited, but at this stage it will probably be unnecessary. If the organization finds it necessary to have a formal training program, setting up a Saturday morning workshop might be the answer. The president begins the session with an explanation of the goals and purposes of the organization. Each member then explains some facet and new volunteers ask questions. After this portion of the program, an informal exchange over coffee can aid in helping volunteers become more comfortable with the organization. The entire program could be accomplished in four hours. In this way, new members could meet old, find out what is
expected of them and determine whether they want to become involved. In this beginning phase, new members do not stay "new" for long. Their enthusiasm and energy are needed and hopefully they should be encouraged to become active, integral parts of the organization.

Motivation. It is important to realize that everyone in the organization needs encouragement. E. Schindler-Rainman and R. Lippitt (1975) reflect the need for members to try to be supportive of others within the group. High morale is important to keep enthusiasm and spirit up. There will be times of frustration and failure and members will need each other for moral support.

Funding

Funding Sources and Methods. Funding sources and methods for the formative stages should be explored in a general manner. Big projects should not be undertaken because of the lack of manpower and experience of the group. A fund raising campaign should involve everyone in the planning and implementation stages, from the president and the board of directors to the newest members.

The nucleus group must decide whether dues will be charged to members. Dues can be a good way to raise funds, but members should receive something in addition to membership for their dues, such as a journal, newsletter, or
services. In this way, they will not feel they are just donating money to a cause.

A public money-raising event must be planned which can be carried out with little expense or manpower. It would be unwise to attempt to hold a bazaar or carnival with a small number of members having to do all the work, state H. Allen and E. Buchdruker (1973). The first money-raising project should be one that can be carried out by a few people and cost relatively little. Getting the project off the ground may entail volunteered funds from members.

Two campaigns may be considered for this fundraising project. The first is a telephone and door-to-door donation campaign. This will involve a great deal of time and effort on the part of members, but it can also create an awareness in the community about the organization and its goals and programs. This might be combined with a drive to obtain new members.

The second type of campaign may be a funds-material donation campaign. Local businesses and community members may be contacted for donations of materials or money. This will give people in the community an opportunity to learn about the organization and may enlist their support.

A combination of the two methods described above may be the best campaign. If the organization can reach both
private citizens and businesses it may be more beneficial in the future.

The organization must plan realistically for this first fund-raising campaign. The first part of the plan is to set a realistic goal for the amount of money to be raised. The second part of the plan is to adopt a realistic campaign to raise funds. If the goal is too high or the program too ambitious, members may become frustrated.

**Budgeting.** A budget will be difficult to draw up when there are few, if any, funds to budget, according to Brian O'Connell. Budgeting will entail drawing up plans for expense projections after funds are raised. A treasurer must be elected at this point to work with funds which are to be collected. Even though there will not be much money to work with, the treasurer must take part in forming expense projections and drawing up the budget.

By considering the material and physical needs of the organization, the president, treasurer, and board of directors can draw up expense projections. The general membership should be included in this process; they may analyze the budget and make suggestions before it is finalized.

**Communication**

**Internal Communication.** Communication within the organization may take many forms, according to Howard
Greenbaum (1974). Announcing a meeting can be done by a telephone committee, where each member telephones one other member or a few members telephone everyone. Other ways to communicate with members of the organization can be through flyers or newspaper announcements.

People who are contacted personally feel that they are of more importance to the organization and may be motivated to attend meetings. The network to be considered must be able to contact members in a relatively short period of time about meetings and other important events, but since the group will probably be small, the system does not need to be elaborate.

An informal telephone committee is one of the best means to keep the organization members informed. This informal committee is usually made up of people who volunteer. The number of people on the committee is not that essential; what is important is their willingness to call people and their follow-through. Committee members are assigned specific names and they contact these same people each time.

**External Communication.** Publicity is also a very important part of this first phase; the community must be made aware of the organization and its importance to the community. Using any existing contacts with the news media is a good beginning. A mention on the local evening news or an article in the local newspaper about the organization
can help a great deal. Getting the organization's name in the public's mind is essential.

As it becomes involved in projects, having a member of the organization prepare news releases about different programs and issues for the newspapers, radio, or television may help gain wider publicity. Preparing news releases so they are "copy-ready" (the article does not have to be re-written) can save media people time and may influence them to use your material. Books in the public library can serve as guides in helping to prepare news releases for different media.

Public service announcements should be considered. Radio and television stations give free announcements over the air for projects carried out by many groups. For the volunteer drive, an announcement broadcast over radio and television may reach many people and may stimulate enough interest to attract new members.

A person who can do the job efficiently and effectively should be selected to be in charge of publicity. Someone who has had experience with the media (a journalist) may be the most likely candidate. If no one is available, someone who is efficient and can follow directions should be selected. After looking at library material, the publicity person should contact members of the local media and ask their advice on how to write news releases to meet
their particular needs. This will establish contact and make different media people aware of the organization.

The first phase of the organization's life will determine whether the organization will succeed or fail. The organization must attempt to avoid areas which stifle growth and avoid detailed organizational charts or budgets. Training members at this point may be a participating-experience program. Everyone must be involved in the development and evaluation of projects because they are essential to the organization. The main thrust of this first phase is FORWARD MOVING! The leaders cannot allow the organization to become stagnant—it must be dynamic!

The Second Phase

Organizational Dynamics

Planning. As the organization moves from a formative to an action stage, planning continues to play an important role. The transition from passive to active will involve changes, modification, and additions to goals, projects, programs, and issues, according to Joan Ecklein.

The goals and purposes established by the nucleus group in the first phase must be re-examined and judgments made as to their validity. The group must ask itself:

--Has the organization grown beyond its goals?
--Are the goals still valid?
--Are new goal-directions indicated?
--Have any previous goals been met?
Once these questions have been answered, planning can con­
tinue.

The entire group should meet and answer the above
questions, then new programs and policies may be discussed.
These include expanded programs, new projects, and changes
in policies.

As the organization matures and becomes more active,
members may see a need to change long-range goals. For ex­
ample, the organization may be unable to serve as a lobby
group and carry out other functions at the same time so it
may decide not to lobby. There may be changes in policy as
the organization becomes more involved in the community. If
a policy is established which prohibits picketing, but there
is a definite need for picketing a business, the policy may
need to be changed.

Short-term goals may also need to be changed. One
short-term goal may be the establishment of a permanent of­
office by the end of the first year. This goal might be
postponed until more funds are found.

Programs which have been started may have caught the
attention of the community and need to be expanded to meet
an increased demand. New projects may need to be initiated
to fulfill other needs. Members of the organization will
need to examine and evaluate these changes and decide, as a
group, whether they will be carried out.
Planning at this stage should continue to be somewhat flexible. The organization should be establishing itself and the need for as much flexibility will be less. But if changes are needed, the group must be able to make them without allowing it to create problems.

Planning may be more detailed; plans should be drawn up for particular projects to be carried out by different committees. Committee reports should be due on a certain date. Elections must be discussed and a hard-hitting recruitment drive must be planned. Other areas such as communication and fund raising must not be overlooked.

The first phase of organizational development was spent in planning the foundation for the organization. During this second phase, the aim should be for the organization to become actively involved in issues and programs so it can better serve the community.

Leadership. The organization will still need the dynamic personality of a first leader. It will probably be beneficial to stay with the same leader for a time. If the organization has not moved forward, new leaders must be chosen, according to Joan Ecklein. If new leaders must be elected, the group should choose members who have proven their ability to carry out tasks, accept responsibility, work well within the organization, and motivate others. If a person cannot fulfill a role, replacement is necessary.
The leaders of the group, at the beginning of this second phase, must still be involved in the programs and projects of the organization. Although it will be growing and new members joining, it is still too early to leave facets of the organization unsupervised. This is a growing, learning time and members must be guided in their efforts; leaders must assist in this guidance.

During this second phase, responsibility must be delegated to members within the organization, according to O. F. Peterson (1955). Committees will take on more responsibility and new committees will be organized to meet needs. The leaders will still be involved in running the organization, but there will be greater encouragement of members to work within committees towards goals. In this way, the organization begins to become decentralized and the necessity to depend on a few members is lessened. As authority is spread among committees, the organization will be more stable, if for some reason the president can no longer serve, the organization would not fold without her/his guidance.

The key to leadership during this second phase is a delegation of authority to committees and committee chairpeople. To succeed, the organization must stand on its own merits. If a leader is the only reason an organization is
succeeding, it is better to discover it during the formative stages.

**Evaluation.** Evaluation is still a necessary facet of organizational dynamics. Accomplishments and failures must be examined to determine the status of the organization. If a group is succeeding in its efforts, success will be a motivating factor. If they are failing to carry out certain plans, re-examination of action or goals may be necessary. In any case, evaluation is a critical element.

Weekly meetings are still an excellent place for evaluation of the projects and programs of the organization. By having each committee give reports, members can be brought up-to-date on what other committees are doing and given the opportunity to praise and criticize different parts of programs. This evaluation may help alleviate problem areas.

The evaluation process must not be ignored. As the organization grows in size, it may be unable to hold evaluation sessions at every meeting, and this will necessitate committee reports to the board of directors. When this becomes necessary, members should be given copies of these reports and the opportunity to comment on them. It is through self-evaluation and criticism that an organization exposes problem areas and concentrates on growing ones.
Organizational Structure

**President.** In this second phase, the president will still be a many-faceted figure. The organization is still dependent upon the few leaders who are active, and the president is the most focal member. Other members will be contacting the president with problems and ideas; committee chairpeople will have complaints and suggestions; the board of directors will need guidance and inspiration; and volunteers will need encouragement in their tasks. The president must be willing to attempt to meet these needs.

The job of the president is mainly that of an overseer, but s/he must begin to delegate authority. Responsibility must be divided among members; the president must "let go." This means s/he will not run every facet of the organization as was done during the first phase. The president must still oversee the organization's projects, programs, and committees, but s/he will not be able to head every one. This is healthy for the organization because it encourages her/him to be involved in a separated way. It also allows the organization to grow around and beyond the leaders--it ensures the organization will not be a personal agency for any one individual.

The main responsibility of the president in this second phase is that of a director. The committees and programs must have the opportunity to operate on their own.
This will help to strengthen the inner core of the organization by training people and allowing them to accept responsibility for the organization.

**Board of Directors.** The job of the board of directors during this second phase is to make and shape policy and to set up a system under which the board may interact with committees. New committees may need to be established, and it is up to the board to decide who will make reports, how they will be made, and when they will be presented.

During this second phase, the board will be taking on additional responsibilities. The board will now be involved in implementing policies which have been established during these first two phases. They will decide which committees will be assigned certain projects and see that they are carried out. Reports to the board of directors are essential if the board is to determine that policy is being carried out correctly.

With the growth of the organization, policies may need to be changed. Members of the organization may decide they want a change, and the board must consider these demands. The board of directors is established for the benefit of the entire organization—if change is needed, the board must respond to it.

During the first phase, the board is involved in establishing policy and beginning to set the wheels in
motion to carry it out. By the second phase, the board is putting more policy into action. The board will also expect feedback in the way of reports on progress or problems, and the evaluation process will begin once again.

Committees and Committee Chairpeople. As the organization grows, new committees may be formed to carry out certain tasks. In the first phase, fund raising and volunteer recruitment committees were formed. There was little need for other active committees. In this second phase, committees may be created to help in the orientation-training of new members, to publish a newsletter, and to carry out special projects.

The planning committees which were established during the first phase should now be expanded and go into full operation, if possible. If there are not enough members to activate all the committees, choose the one or two committees which are most important, have a fair chance of success, and are supported by the members. Put them into operation.

When the committees are ready to begin operation, they will need the full support of the organization. If extra effort is needed by people who do not normally serve on that committee, it should be given. Non-support of a fledgling committee may cause it to fail before it begins.
The people on the committee may not have enough time or resources to do it by themselves, so everyone may have to help.

At this point, it is wise to have the president and the board of directors evaluate the jobs done by the committee chairpeople. If they have not carried out their responsibilities, they must be replaced. Look within the committee first to determine if there are members who can do the job. If not, choose someone who has proven herself/himself able to accept responsibility and carry out tasks.

Committees have had an opportunity to work closely together. If there are interest differences, personality conflicts, or other problems, members may want to change committees. This may be a wise thing to do as part of the evaluation process. If someone is unhappy doing her/his job, s/he may be more productive working somewhere else within the organization. One goal of the organization is to keep volunteer workers happy, satisfied, and fulfilled. By allowing them to choose to stay on one committee or join another, the organization is working toward that goal.

Volunteer Recruitment, Selection, Training, and Motivation

Volunteer Recruitment. Volunteer recruitment is still an important aspect at this phase. The organization must have members who are willing to participate.
The plans which were utilized during the first phase may be used again but in an expanded capacity. Self-recruitment may become more common as people in the community find out what the organization is doing and are interested enough to want to participate. But members should realize this form of recruitment cannot be depended upon to produce many volunteers.

Informal recruiting may be a good way to reach people, but far-reaching programs must be established to attract new members. At this stage, an intensive media campaign may be a good choice to cover many areas. Television and radio audiences are large and must not be neglected. Public service announcements and interviews with members of the organization are important. Local radio and television talk shows are also good formats, allowing members to discuss what they are doing and what they hope to do. A mention of the organization and its projects may be made on various informational programs, such as local consumer shows and news-talk shows.

If the radio and television scene is not bright, local newspapers offer another good opportunity. An article in the local Sunday newspaper will be one of the best exposures an organization can have. Try to be sure dates, times, and locations of meetings are included so interested citizens might attend.
In addition to a media campaign, contacting other organizations is a good strategy. Local church groups, the PTA, and service organizations may have members who might want to participate. Contacting the presidents of the other groups and arranging to speak to a gathering of members may also be necessary. Explain to them what the organization is, its goals, its successes, and failures. Tell prospective members why they are needed and how their efforts will help the organization to succeed. At this meeting, tell people to attend.

The organization will need to devote a great deal of time to recruitment of the general public. Use of the news media is the most far-reaching strategy. Recruitment from other agencies and groups is a second strategy. Both of these campaigns should be employed because of the need to reach as many people as possible.

Selection. Selection of volunteers is still unnecessary; manpower is important. A volunteer consumer organization is usually run by people who are not trained in consumerism, but they quickly learn how to deal with the programs and issues. Most people joining the organization are willing to learn. Their enthusiasm and willingness can be more important than skills.

According to Geraldine Aves, the attitude of the Red Cross towards selection of volunteers is that anyone who
wishes to join can perform some task. Their programs are varied and diverse and use many types of people. The same should be true for a voluntary consumer organization; do not turn anyone away who is willing to work.

Volunteer Training. If the recruitment drive is successful and there are many new volunteers, a formal volunteer training program may be necessary. A committee must be formed to deal with this program.

In establishing a volunteer training program, the aim should be to orient and train the new members quickly and efficiently. The committee should hold a "mass training session" for all new volunteers after a big recruitment drive has ended or have a training session when the number of volunteer reaches a specific size, such as eight or ten. Training many people at once will save time and manpower.

This first training session is a general exposure of new members to the organization's goals, purposes, programs, and projects, according to Anne Stenzel. It is held to acquaint new volunteers with how the organization works and what it is trying to accomplish. Each committee chairperson, in addition to the president, should be there to help. The president gives a general welcome and each chairperson discusses her/his committee and describes its functions and programs. This exposes new members to existing committees and allows them to choose one they want to serve on.
This general training session should last one day, such as a Saturday. The first morning session should be orientation to the goals and purposes of the organization, while the second morning session should be discussions by chairpersons. The first afternoon session should be an open meeting where new members can ask questions to clear up any confusion they may have. The second afternoon session should be devoted to talking to committee members and the chairpersons individually and signing up to be on specific committees. After this general training program is held, it is up to the organization to decide if others are needed.

As new members are recruited, training may be informal. The new volunteers may talk with the chairperson of volunteer training and s/he may informally orient and train them in a short afternoon session. If this is the situation, new members must be given the opportunity to meet with committee chairpeople—perhaps at the next general meeting.

Important areas to be covered in any type of orientation and training session are information, skills, and understanding. These sessions must give the new volunteers information about the organization, its goals and programs, a knowledge of the skills required for different positions, and an understanding of the organization and how it fits into the community.
Motivation. Motivation will always be an important aspect of working with volunteers; without motivation volunteers may lose their enthusiasm. Ways to provide motivation include praise for jobs well done, encouragement when there are problems and a frank discussion, without blame, when something fails. Everyone needs to be told their effort is important to the organization. Committee chairpeople need to reinforce members' contributions as positive efforts.

Funding

Funding Sources and Methods. After the first phase has passed and some funds have been raised, it is time to pursue more ambitious fund raising projects. During the second phase, different sources of funding should be explored by the committee. After one or two sources have been decided upon, a plan must be drawn up, presented to the board and general membership for approval, and then put into action.

Sources to be explored include gifts, grants and foundation contributions, solicitations, membership dues, and special events. Of the above five sources, solicitations and membership dues may be the two most profitable alternatives to explore. Grant and foundation contributions will probably not be forthcoming without a proven track record, and the organization at this point will probably not
have one. Special events, with a small membership, require a great deal of time and effort and should be postponed until there are more people to participate. Gifts are given, so an organization cannot count on them.

Solicitations are appeals for donations from groups, businesses, and individuals. The solicitation campaign described for the first phase can be used again at this point. It must be expanded to utilize the increased manpower of the organization to reach more businesses and individuals. This is a process of contacting solicitees and asking for their financial help. Door-to-door campaigns and a general appeal to other groups or the general population by means of the news media may also be a part of the program.

Dues must also be considered because they are a continuing source of revenue. Yearly dues are probably the easiest to handle because of the paperwork involved. Most organizations try to give their members something for their dues, such as a newsletter, workshops, or informational services of some kind. This added responsibility should be considered when discussing this as a source of funds.

Funding for these first two phases will probably not be great and the organization must be prepared to work with a limited amount of money. Once the group has become established and projects and programs are operating, other sources such as grants and foundation contributions may be
pursued. But, at the beginning, funds will be scarce, making the organization direct its efforts into areas where a great deal of money is not needed, such as planning and development.

**Budgeting.** After the first fund raising campaign, the treasurer will have funds to plan a working budget for the organization. The budget should cover the period until the next large fund raising campaign is completed. It is necessary to realize that the organization is growing and more funds may be needed, so keep this in mind as the new budget is prepared.

The budget plan should cover operational expenses (cost of supplies, mailing, copying, banking), publicity costs, fund raising campaign costs, and special projects and program costs. An essential part of this budgeting is an evaluation of the budget plan preceding this new plan. Was the budget realistic? Were there unforeseen, added expenses? Was too much money budgeted in one area, not enough in another? Evaluation of the past plan will aid in establishment of a new budget.

A committee should be selected to aid the treasurer in drawing up a budget. The committee not only makes suggestions but can help project expenses for the next budgeting period. Once this committee has drawn up a budget, then
the board of directors should approve it before it goes to the general membership for final approval.

Communication

**Internal Communication.** There is little need for change with the internal communications system. The phone committee is still a vital part of the organization in keeping members informed of meetings or changes in plans. A newsletter may be considered, but at this point mailed announcements or calendars of events may be all that is economically feasible. The phone committee is the most important contact link for the organization.

**External Communication.** External communication must be discussed so awareness of the organization within the community may be raised. Relations with media people should be well-established by this time; they should be familiar with the organization and the publicity chairperson. A publicity committee should now be established to help the publicity person deal with the many facets of publicity.

Two areas to be explored by the new publicity committee are establishing relations with other organizations and establishing working-relationships with local political leaders. Establishing relations with other groups may enable the organization to gain support or assistance for particular ventures, such as picketing or fund raising events. Many people may be needed for picketing and two groups
working together would be more effective than one. It might be impossible for one group to hold a particular special fund raising event, but two groups could handle it, splitting profits between them. It is a good idea to have a working relationship with other groups so the organization may enlist their aid if the need arises.

Local political leaders can be very helpful. During this stage, sympathetic leaders should be approached and made aware of the organization and its goals. If community issues of importance can be aided by lobbying, the organization should contact political leaders and ask for their help. If the people in politics are familiar with the organization, it is beneficial.

After the first two phases, operation of the organization is essentially a repetition process of the basics covered in the previous two sections. The organization moves into the continuity phase, continuing programs and projects already developed. Members must be aware of the possibility of the organization becoming stagnant and attempt to avoid this. The continuity phase is the stage at which the organization can stop moving forward—projects and programs become established entities and members become complacent in running them. Members must be aware of this fact and attempt to keep programs and projects growing by evaluating progress and exploring new areas.
Evaluation is essential, whether it be by each committee, the board, or the general membership. If there is not a constant re-evaluation of what has been accomplished and what is yet to be accomplished, there is no yardstick by which to measure success or failure.

After the first phase, leadership moves into a continuing role. The first president steps down and a new president is elected. This will encourage all members to participate in the organization and encourage them to become involved.

The duties of the president, the board of directors and the committee chairpeople continue as before. Responsibility should be divided among the various committees and members of the organization so there will be a decentralization of power.

The volunteer aspect will always be an important part of the organization and must never be ignored. The volunteer recruitment programs used in the first two phases should be continued. There will be times when many volunteers are needed and other times when only a small number must be recruited and trained. Certain successful recruitment and training programs and techniques will be evident. The organization should continue to use the ones which have proven to be successful in the past. If new methods are developed, they should be tried, too. There will be little
change in programs and policies of the first two phases because each recruiting effort is a new venture. The only major changes should be elimination of problem areas.

Funding methods and sources may be an area where the greatest growth is seen. As the organization matures, two additional areas may be explored; grants and special fund raising events. As the organization establishes a "track record," grants may be applied for. Many corporations, foundations, and the federal government supply grants to qualified applicants. If there are grants to apply for, books and pamphlets at the local library can aid the treasurer and her/his committee in making application.

Special fund raising events may be undertaken if the organization is large enough or if another organization participates. A bazaar, a carnival, or a sporting or entertainment event can help raise funds. The essential part of the success of such a project is careful planning. Every detail must be taken into account, and a comprehensive plan covering everything from a change in the weather to a "no-show" of expected participants should be drawn up.

Communications expansion should consist of additional projects such as surveys and a newsletter. Many different types of surveys, such as food, toy or merchandise price surveys, or opinion surveys may be conducted. They may be done by on-the-spot pricing or by telephone. Telephone
surveys should be restricted to opinion polls. If the organization is doing price surveys, prices should be obtained from a visit to the store; this helps eliminate errors.

An important aspect which cannot be overlooked is the hiring of a paid, professional staff. This may be considered at any phase, but most probably will be needed at the continuity phase.

The organization will need to consider hiring a paid, professional staff when volunteers can no longer easily handle some operations or when a special need arises. The addition of a professional staff must be approved by the general membership because it is a big step for an organization to take.

When volunteers can no longer easily handle some operations and the organization considers hiring a paid professional staff, the extra help is needed to carry on daily chores. A hired staff will take care of correspondence, telephone work, typing, filing—procedures which free volunteers to handle disputes, work on educational projects, speak at gatherings, or perform other important functions.

The type of professional staff may be clerical aid at the beginning, or it may include an executive director. If only clerical help is required, volunteers working in the office will be able to give the hired secretaries direction and work to do. If an executive director is also hired,
s/he will perform this task, in addition to other responsibilities such as carrying out policy set by the board of directors, coordinating projects and programs, and seeing the headquarters of the organization runs smoothly.

Members of the organization must be sure that hiring a paid professional staff on a full-time basis is essential to the efficient running of the organization. It may seem necessary to members to have a staff carrying out daily chores, but if it is not a real need, harm could be done. A staff frees members to go on to other tasks and responsibilities; if a staff only frees members and there is nothing for the volunteers to do, these volunteers may not stay with the organization. In this way, harm can be caused, so hiring a paid professional staff must fulfill a real need.

A professional staff may also be hired on a temporary basis or to carry out one project. For example, the organization may receive a grant for a certain project and need the services of outside help to do the job. A professional staff might include clerical aid, statistical counseling, legal advice, or professional guidance. These people could be hired on a consulting or hourly basis for the work they perform. When the project is completed, their services would be terminated. Temporary help may be needed to perform a specific function. If the organization is preparing for a large conference, a temporary staff may help
with paperwork or other chores to be performed behind the scenes.

The hiring of a paid professional staff may be necessary at any point in the life of the organization, or it may never be necessary. The responsibilities, tasks, projects, and programs of the organization will determine this need. It must be remembered, though, that hiring a professional staff must not leave volunteers idle. If a staff is hired to take on chores volunteers have performed, then it is essential that those volunteers are given other responsibilities so they do not feel they are being forced out of a job. Only in this way will the organization continue to function in a responsible way to its members and the community it serves.
CHAPTER 5

EXAMINATION OF SELECTED FUNCTIONS

This chapter will deal with four different aspects of a voluntary consumer organization not covered previously: dispute handling, educational programs and projects, newsletters, and lobbying. Each will be discussed in a separate section.

Dispute Handling

Dispute handling can be a major focus of any voluntary consumer organization. Consumers are going to have disputes, and having the opportunity to turn to an autonomous organization can be very helpful. A volunteer group can picket or boycott, call in the press, and employ action a government agency would not be able to. This is where the strength of the volunteer consumer agency lies—in its freedom to help the consumer. Procedures must be followed, but when a dead-end is reached, the organization can decide what measures to take to resolve a dispute.

In dispute handling, there are many factors which must be discussed: consumers' initial contact with the organization, caseworker procedures, organizational contacts with business people, forms to use, and interviewing
techniques. These must be understood and correctly utilized for the organization to be efficient in handling disputes.

Contacting the Organization

A consumer with a problem must have some way to contact the organization. One effective way is to have a number of volunteers form the contact committee. Consumers with disputes make initial contact with these volunteers. Ideal for this type of job would be volunteers who could not easily get out of their homes, such as elderly persons, a houseperson with small children, or invalids. The people on this committee do not necessarily handle disputes but pass the information on to volunteers who do.

Cards for information can be 3 X 5 index cards. The information needed would include:

Name
Date
Phone number
Best time to contact
Nature of complaint
Caseworker's name (see Appendix A, Fig. 1)

When a call comes in, the contact person records all of the above information on cards and logs some of the information into a log-notebook. The log-notebook would need the date, name, and phone number so if something were to happen to the card, the consumer could be re-contacted.
At the end of the day, the contact person notifies the caseworker of the disputes, and the caseworker either picks up the cards or takes the information over the phone. It is then the responsibility of the caseworker to carry the case from this point.

The contact committee is a good way for people to become involved in the organization who might not be able to actively participate in any other way. As the organization grows and an office or headquarters are permanently established, the contact committee may be disbanded. Once an organization has its own telephone line, a 24-hour hot line may be set up with the purchase of a telephone answering device.

Caseworker Procedures

When a consumer contacts the organization with a dispute, caseworker procedures begin. It is essential to remember that consumers who have a dispute are usually upset, and they must be contacted immediately. By establishing procedures with specific timelimits involved, the organization helps itself and consumers.

Consumers with disputes do not want to wait to deal with their problems, so once the information has been received from the contact committee, the caseworker must contact the consumer within twenty-four hours. At this initial phone contact, the caseworker must ask the consumer
if s/he has contacted the manager about the problem. If that has not been done, the caseworker informs the consumer that such contact must be made before the organization can handle the case.

Many cases are resolved when the business person and consumer meet and talk about the dispute. Requiring the consumer to attempt to resolve the dispute first serves this function.

The consumer who must contact the business person should be asked to call the caseworker back after contact has been made and let the caseworker know if the case has been resolved. The caseworker should call the consumer back in three days if this situation arises and the consumer does not call the caseworker. In this way, the caseworker can find out what events have transpired, and it can help the organization keep a record of cases it helped consumers to resolve on their own.

If the consumer has already tried to resolve the dispute and has had no results, it is important to arrange to meet with the consumer within the next twenty-four hours, so more information may be obtained and the case can proceed. Caseworkers should arrange to meet the consumer at a convenient place—home, office, or the library. It is important that the consumer and caseworker have a place to sit down, fill out the dispute form, and talk over the problem.
It is also important to meet the consumer face-to-face because the consumer must sign the dispute form before the caseworker can proceed. It is also necessary to obtain copies of receipts, letters, bills, and any other paperwork to be used in the case. If it is impossible to meet face-to-face with the consumer, fill out the form over the telephone, mail it to the consumer to sign, and have the consumer return the form and any copies of paperwork to the caseworker. Then action may begin.

The dispute form does not need to be lengthy; one page will generally suffice. The information on the form provided here for examination is detailed, yet easy to obtain (see Appendix A, Fig. 2).

Most of the information is self-explanatory, but there are a few areas which might need clarification. It is essential to know the action taken by the consumer to avoid duplication of efforts. If the County Attorney is already handling the case, the organization may not want to pursue it. Or, if the case has been handled by another agency and no resolution was reached, resolution may not be possible. This is necessary so the organization can handle complaints and not duplicate efforts of other organizations.

The dollar amount in dispute is determined by the consumer. If there is no exact dollar amount, have the
consumer estimate what the dollar amount of the resolution would be worth to her/him.

Under details of dispute, it is wise to list events by date in chronological order. The details need not be lengthy, just a brief description of the order of events will be sufficient. If more space is needed, the back side of the page may be used. However, try to keep most of the back page free because all action taken will be recorded on the back of the form.

The resolution the consumer is seeking should be stated in a dollar amount if the consumer is seeking money, or a type of service if that is what the consumer wants. For example, if a consumer's dispute is over a repair of some sort, the consumer may just want the item repaired correctly, not putting a dollar amount on it. If possible, have the consumer place a dollar amount on the resolution if that is all the business person is willing to offer.

The dollar amount of resolution is to be left blank until the case has been resolved. It is then filled in with the amount received or an estimated dollar amount of the service.

It is essential to have the consumer sign the form because this establishes the validity of the dispute and implies that the organization is proceeding upon the
consumer's request. With the consumer's signature, the organization lessens its responsibility for misinformation.

The form should be filled out in black ink (so it will copy well) and the caseworker should write legibly. A copy of this form will be sent to the business person and s/he must be able to read it.

The case number at the top of the page corresponds to a number in the case logbook which the president or dispute chairperson keeps. This logbook will be discussed later in the section.

After the dispute form is filled out and the consumer signs it, the caseworker proceeds to contact the business person. This should be done by mail so there is a record of the contact. A form letter will be mailed to the business person along with a copy of the dispute form and a copy of any receipts, bills, or papers (see Appendix A, Fig. 3). The organization keeps the original dispute form, a copy of the letter, and copies of all paperwork for their files.

With the letter and dispute form, enclose a self-addressed envelope. To avoid the high cost of postage, do not include a stamp. Most business people will mail their reply back and pay their own postage.

After the letter and dispute form have been mailed, the business person is given ten working days to respond.
It is best for the organization to have a post office box where mail can be delivered. In this way, even though the organization may not have its own office, it does have its own address. This adds credibility to the organization.

The details of the case must be recorded in a logbook which is kept by the president or dispute chairperson. In the logbook are: case numbers; the name, address, and phone number of both the consumer and the business; the nature of the dispute; the dollar amount in dispute; a space for the amount of resolution; and a ten-box calendar for recording dates at separate steps (see Appendix A, Fig. 4). There are also two lists which accompany the log; one on types of disputes (see Appendix A, Fig. 5) and the other a list of steps to be covered (see Appendix A, Fig. 6). The list of disputes is broken into two categories; merchandise and services. In this way, an auto repair problem can be listed separately from an auto purchase problem. This helps clarify the types of cases the organization handles. The "steps to be covered" list can be modified to suit any organization.

When ten working days have passed, another look is taken at the case. Has the business person responded? What type of resolution was offered? Did the consumer accept the resolution the business person offered?

If there has been a positive response by the business person and the consumer has accepted the resolution,
the case is closed. If the business person has responded with a less-than-full resolution offer, contact the consumer and see if s/he is willing to accept it. Many times a consumer will take less than was originally asked for. If the consumer and business person cannot agree, try to set up a meeting between the two with a few organization members present to see if a satisfactory resolution can be reached.

If no response is received from the business person, call her/him and find out why. There may be a reasonable excuse. If the business person did not respond because s/he did not want to, try to talk reasonably with her/him. Explain in a quiet, rational manner that one unhappy consumer may mean a great deal of bad word-of-mouth advertising. Ask the business person if s/he can offer a resolution. If the business person suggests a resolution, contact the consumer and see if it is acceptable to her/him. The case may be resolved at this point.

If the caseworker cannot make any headway with the business person or consumer, the case must be brought up to a grievance committee. This committee will determine the next steps to be taken. The grievance committee may decide to boycott the business person's establishment, picket the store or call in the press.
Interviewing Techniques

When a caseworker is interviewing a consumer, s/he must behave with respect and employ certain techniques.

1. Explain to the consumer what the organization is and what it does.
2. Do not be judgmental.
3. Do not make promises about what resolution may be reached.
4. Use open-ended questions, not questions which can be answered "yes" or "no." Ask questions so the consumer explains what happened in her/his own words.
5. Listen closely to what the consumer is saying.
6. Do not be afraid to ask the consumer to clarify a point.
7. If the consumer suggests an outrageous resolution, ask, "If that is not possible, what other resolutions would be fair?" If needed, suggest alternatives.
8. Respect the consumer and her/his rights.

By following these basic procedures, caseworkers can avoid communication problems with consumers. Consumers with disputes may be excited or angry, and caseworkers must treat them so they will not become more upset or angrier.
Educational Programs and Projects

A very important function of a volunteer consumer organization is education of consumers as to their rights, how they can resolve their own problems and ways to avoid problems in the future. Each organization must decide what types of programs and projects they want to pursue or develop. This section will discuss various ways to provide education to the consumer public.

Workshops for the public can be valuable. A half-day workshop may provide consumers with information to help avoid problems or resolve ones they already have. Resource people may be brought to the session to give a presentation; then consumers could ask questions. For example, a workshop may be held to help women having problems with establishing credit. A resource person can discuss ways for women to establish credit and keep their own credit rating; then consumers ask specific questions.

Another educational project may be a weekly consumer column in the local newspaper. This column would discuss consumer problems and resolutions and deal with ways to avoid disputes. It would cover deceptive and illegal practices and provide information and help for consumers. It could be written by a newspaper staff person, and organization member, or group of people. It could also be a way to
advertise what the organization is involved in and what volunteer help may be needed.

Other committees may be formed to gather and disseminate information to the public. This may be in the form of pamphlets, flyers, or public announcements. One problem with pamphlets and flyers is that few people keep them because they are of little use. A delivery system should be developed for each informational project. For example when developing a delivery system for an auto repair card, one group used a card that would fit on the visor or in the glove box. On one side was printed ten tips to remember when having your car repaired; on the other side was the name of the organization, the telephone number, the logo, and a maintenance-milage chart. The card not only provided factual information but a convenient way to keep a record of maintenance performed on the car.

An organization may want to establish a library of information. Articles in magazines and newspapers, pamphlets, copies of speeches, books, and government publications might be gathered together in one place and systematically filed. In this way members have access to data for other projects.

A speaker's board may be formed to speak on problems, issues, or cases to other groups such as women's clubs, unions, church organizations, or public-interest groups.
Particularly well-qualified people might be chosen to speak at school assemblies or classes. Young people need to be made aware of their rights and the problems which face them as consumers; even young people have consumer problems!

Ongoing programs and one-time projects are two different considerations. The organization as a whole must decide what types of programs they see as ongoing, such as a speaker's board, a newsletter, or a newspaper column, and which projects they see as one-time, such as a "tips to remember" card on bicycle repair or Christmas comparison shopping.

The types of projects an organization will work on depend upon the needs of the community, the interests of the members, and the resources available. One criterion which must be part of every educational project is to undertake only those activities which will help the community. Projects should be undertaken because they are of value to many people.

Educational programs and projects are an essential element of a consumer organization because education of the public is an important goal. Each organization may vary in the types of programs and projects it will be involved with, but the basic aim of education must be an integral part of all endeavors.
Newsletter

Publication of a newsletter can be a very important function for an organization. A newsletter can serve as an in-house communication device, a fund raising mechanism, or an information disseminator.

As an in-house communication device, a newsletter can keep members informed about activities within the organization, such as meetings, workshops, or programs. It can supply them with information they could not receive elsewhere. This personal contact with each individual helps build a cohesiveness within the group.

Through subscriptions, a newsletter can serve as a valuable fund raising device. In many organizations, a number of members belong because of the information which can only be found in the newsletter.

It is also a way to sustain membership; newsletters can provide a cohesiveness due to the information they give, and the contact they maintain with the organization. They also serve the recruitment function by building an awareness of the organization and letting people know what information is available to members through a newsletter.

The value of a newsletter in disseminating information is that the information should not be available in other sources. That is, the items reported in the newsletter are not pieces published in the local newspaper or articles
extracted from national magazines. These are items (such as surveys, interviews, and reports) done by the members about the community.

Some organizations publish a newsletter because they feel it is a necessary part of running a consumer organization. This researcher feels publication of a newsletter must be critically evaluated by organizational members before a decision can be made as to whether to become involved in such an ongoing project. A newsletter is a very time-consuming project and the organization must have members who can spend time putting together this publication. It is also an expensive project; there must be enough money to pay for printing, paper, and mailing.

One major concern is that an organization which publishes a newsletter cannot allow it to become the only function the organization performs, to the exclusion of other projects. Publication of a newsletter must be viewed as only one project the organization undertakes, and it should not have an excessive amount of time devoted to it. A newsletter committee should be able to handle writing editorials and articles, handle the layout, publication and the mailing.

The organization must have enough people to form a publication committee; it must also have enough programs, projects, and issues it is involved in to write about. If
there is no news to put into the newsletter, interest can quickly wane.

An organization must evaluate a newsletter just as it evaluates all other aspects of the organization. Members must determine whether the newsletter is fulfilling its functions and if members are using the information contained within it. Part of this evaluation must also determine how the project is being carried out: how much time is devoted to it, what is the overall quality of the newsletter, what functions does it perform? If an organization is considering publishing a newsletter, all of these factors must be taken into account. A newsletter can be a valuable tool for an organization if used wisely. It can create problems, though, if it is not carefully evaluated before the organization accepts the responsibility of such a large task.

**Lobbying**

Lobbying, like publication of a newsletter, must be critically evaluated before an organization becomes involved in it. It is a difficult task to perform and requires extra time and effort from those members participating.

If an organization decides to lobby, lobbying can create a great deal of publicity and visibility for the organization. It can raise interest in issues the organization is involved with. Lobbying can help fulfill the need for a consumer voice in government and get citizens
participating in issues of importance to them. It can also serve as a recruiting device, due to the added exposure and the awareness it can create with the public.

But it is a very difficult job. Someone must constantly be monitoring what is happening so input may be made. Members must be involved in legislative events and keep abreast of changes and actions to fulfill this task.

Friction can be created by a split within the organization on support of an issue. If one faction supports an issue and another does not, it can cause problems. An organization must be able to deal with these problems and decide how a decision will be reached.

Evaluation of the lobbying function must be undertaken as all other evaluations are. Members must decide whether the job they are performing is valuable for the organization and the community. They must also determine what effect lobbying is having on the organization itself; is it causing friction, unification, or having no effect at all?

Lobbying is a full-time function and should be undertaken only when members have enough time and expertise to handle it. Lobbying is a difficult task to perform and to be effective lobbyists, members must be willing to devote a great deal to this effort.
CHAPTER 6

SUMMARY AND CONCLUSIONS

Summary

The model for a local voluntary consumer organization deals with five major areas of concern:

- organizational structure
- organizational dynamics
- volunteer recruitment, selection, training, and motivation
- funding sources and methods
- communications

Each of the five major divisions is an in-depth study of a specific area and deals with problems and solutions, provides suggestions, and is a guide for programs and issues. With careful evaluation and assessment, this model can help interested citizens establish a local voluntary consumer organization.

Evaluation of the effectiveness of this model, relative to its goals and purposes, is a necessary process. This can be accomplished in two ways--by internal and external means.

Throughout the model, the process of internal evaluation has played a very important role. A constant re-evaluation of the organization's ability to reach its goals has been considered an essential part of the growth
of each committee, the board of directors, and the organization as a whole. When committees meet, it has been suggested they evaluate what they have accomplished and their plans for future projects. In this way, internal evaluation becomes a continuing activity of the organization, not a once-yearly catharsis. With constant re-evaluation of goals and objectives, members can avoid wasting time and effort in unproductive ways. Programs and projects which are not producing desired results can be modified or eliminated.

External evaluation is a more difficult concern to deal with; this type of evaluation requires outside means to measure the success or failure of the organization to reach goals. One way in which this might be accomplished is through the development of a questionnaire to be sent to consumers who have been in contact with the organization. The questionnaire would deal specifically with the consumer's reactions to the organization, the help received, and feelings about the attitudes held by the general public concerning the organization.

Other possibilities exist for external evaluation, such as evaluation by business persons who have dealt with the organization, by local government officials, or by other agencies and organizations who are in contact with the group. Another method of evaluating the organization is through the use of an analyst who is hired by the
organization to measure the effectiveness of programs and projects and to measure the attitudes held by the community. This person or persons would be unbiased in their assessment of the organization and might provide data, opinions, and recommendations which the organization would not have considered.

Evaluation is very important for the organization because so much knowledge can be gained from it. Through the use of external and internal evaluation, the organization may redirect programs and projects, create new policies, or establish new goals. In this way, it can serve the community more effectively.

Conclusions

According to Webster's International Dictionary, a model is "something intended to serve as a guide." The model presented here is to fulfill that function—to serve as a guide for interested, concerned consumers who want to build a consumer-oriented organization to help others.

A model is a pure creation and works very well on paper. A working organization can only use a model as a guide; there should be no attempt for an organization to use a model in its pure form. Adaptations, modifications, elimination, additions—all are part of using a model.

This model should not be seen as the final authority on the structure of a local voluntary consumer group. Each
organizing group will find areas which are not applicable to specific problems or issues in which the organization will be involved. The nucleus group must look at the model objectively, change and mold the ideas presented to suit the needs of its individual organization.

One of the weaknesses of any model is that it cannot take into account human variables and turns of events. In some instances, this model can work very well because there are no major barriers; in others it might have little or no application because the situation does not lend itself to use of the model. But the model should be analyzed by interested groups because there may be some applicability to the workings of the organization.

There are areas which could be investigated in more depth. Some readers might wonder how this researcher could have left out particular issues. This researcher has attempted to give a universality to this model by dealing with issues of major concern. As it is to serve only as a guide, areas which have been overlooked may be of concern only to a few groups.

After completing this study, a conclusion this researcher reached is that there has been a general lack of in-depth research in the areas of voluntary organizations and consumer organizations. With such a lack of information available, no conclusions may be drawn as to what is
involved in making up and running an effective consumer organization.

The information which was available was sketchy and usually dealt with one area only; this made comparison of programs and purposes difficult because there was very little to compare. It was frustrating to this researcher to pick up a piece of literature, expecting to be able to find certain information, only to find the article did not deal with the issue at all.

If the public expects to find information pertaining to forming and running a voluntary consumer organization, they are not going to find it. If existing voluntary consumer organizations expect to grow and encourage new groups to become viable entities, they are going to have to initiate research projects to make this information available to others.

This model can help an organization establish goals and objectives, build a strong foundation, and serve the community. It is up to members to use the model as a guide, change it where needed, and apply the finished product to running their organization.

Future Research

Evaluation of the success or failure of this model as a guide for forming a local voluntary consumer organization is the primary indication for research. A study of the
organizations which utilize this model would include development of an instrument to evaluate the effectiveness of the model after utilization by different groups. Other areas for research include a study of consumer leaders and a study of the history of consumer groups in general.
APPENDIX A

EXAMPLES OF FORMS
<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
</tr>
<tr>
<td>Phone Number</td>
</tr>
<tr>
<td>Best time to contact</td>
</tr>
<tr>
<td>Nature of complaint</td>
</tr>
<tr>
<td>Caseworker's name</td>
</tr>
</tbody>
</table>

Fig. 1. Contact Committee Information Card
CASEWORKER_________________________CASE#_________________________

DISPUTE FORM

NAME_____________________________DATE__________________________

ADDRESS_________________________ZIP______________________________

HOME PHONE____________________OFFICE PHONE____________________

NATURE OF DISPUTE_________________TYPE PRODUCT/SERVICE_________________

ACTION TAKEN BY CONSUMER:

CONTACTED OTHER PARTY? YES_________NO_________
RESULT? NO REPLY _______ UNSATISFACTORY REPLY _______

CONTACTED OTHER AGENCY OR ATTORNEY? YES_________NO__________WHOM _______

PERSON OR BUSINESS DISPUTE WITH______________________________

ADDRESS______________________________

PHONE______________________________ $ AMOUNT IN DISPUTE________________

REPRESENTATIVE OF BUSINESS ____________________________

DETAILS OF DISPUTE: (ACTION TAKEN, DATES, ETC.)

___________________________________________________________________________

___________________________________________________________________________

RESOLUTION CONSUMER SEEKING ________________________________

___________________________________________________________________________

___________________________________________________________________________

$ AMOUNT OF RESOLUTION________________

I AGREE THE ABOVE INFORMATION IS CORRECT ___________________________ SIGNATURE OF CONSUMER

A COPY OF THIS WILL BE SENT TO THE BUSINESSPERSON INVOLVED

PLEASE NOTE ALL ACTION TAKEN ON REVERSE SIDE

Fig. 2. Dispute Form
Name of Business Person
Street Address
City, State Zip

Dear

Enclosed is a copy of the dispute form recently filed with our office by

Our organization is a service for consumers. Our purpose is to educate consumers in their responsibilities and rights and to help resolve disputes between consumers and merchants.

Please take a few minutes to read the enclosed dispute form and the proposed resolution. We would appreciate your cooperation in replying to the proposed solution. Please return your response to us within ten (10) business days. You may use the reverse side of this form to make your response and return it to us in the self-addressed envelope.

Thank you for your cooperation.

Sincerely yours,

(Caseworker handling dispute signs here)

enc: Dispute form
Self-addressed envelope

Fig. 3. Form Letter to Business Person
| 1. | Air conditioning/heating equipment |
| 2. | Animals/pets/veterinarians |
| 3. | Appliances and repairs (T.V., radio, hair dryer, toaster, etc.) |
| 4. | Automobile sales and dealers |
| 5. | Automobile repairs (repair, painting, body work) |
| 6. | Beauty aids (beauty salons and cosmetics) |
| 7. | Books/magazines |
| 8. | Carpets and floor coverings |
| 9. | Clothing and jewelry |
| 10. | Collection agencies |
| 11. | Credit (companies, credit cards, etc.) |
| 12. | Door-to-door sales |
| 13. | Employment agencies |
| 14. | Entertainment |
| 15. | Financial (banks and loan companies) |
| 16. | Food |
| 17. | Health spa/dance studios |
| 18. | Home furnishings/furniture |
| 19. | Hotels and motels |
| 20. | Insurance |
| 21. | Laundry/dry cleaning |
| 22. | Mail Order (clubs, catalogues, etc.) |
| 23. | Medical/health services |
| 24. | Mobile homes |
| 25. | Moving and storage |
| 26. | Pest control |
| 27. | Photography |
| 28. | Service Stations |
| 29. | Services |
| 30. | Travel |
| 31. | Towing companies |
| 32. | Utilities |
| 33. | Miscellaneous |

Fig. 5. Types of Disputes
**STEP**

1. Date advised student to contact business.
2. Date of meeting with student.
3. Date of meeting with business person or date letter sent.
4. Date received reply from business person.
5. Date of notification of problem to other agency.
6. Date of referral to other agency.
7. Date of "appropriate procedures." (Code what they are.)
8. Date of resolution by other agency.
9. Date of resolution by CRB.
10. Date student decided not to pursue case or CRB decided no resolution possible.

**Final Resolution**

Date of final action and Step number.

Fig. 6. Steps for Log
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