

ABSTRACT

TRANSITIONING OLDER VOLUNTEERS: EXPLORING THE PERCEPTIONS OF VOLUNTEER MANAGERS IN THEATERS AND PERFORMING ARTS CENTERS

by Hsin-Chih Tsang

Recent studies show that one-fourth of the population over the age of 65 volunteered in at least one organization in 2013. Previous research suggests that volunteering benefits the elderly population physically and mentally. However, there is a lack of research on volunteer transitioning. This is a qualitative study exploring the attitude of volunteer managers toward transitioning older volunteers in theaters and performing arts settings. Eight open-ended, semi-structured phone interviews were conducted with 12 theater volunteer managers in the United States. Telephone interviews were audio-recorded and lasted 30 to 45 minutes. The result shows that transitioning is a process that requires mutual decisions between the manager and the older volunteer. Transitioning involves changing the volunteer's position or terminating the volunteer's role depending on situation. The transitioning model proposed in this paper may be useful for other organizations that depend on older volunteer.

TRANSITIONING OLDER VOLUNTEERS: EXPLORING THE
PERCEPTIONS OF VOLUNTEER MANAGERS IN THEATERS AND
PERFORMING ARTS CENTERS

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Chapter One: Specific Aims and Background

Older volunteers are a potential human resource for non-profit organizations. Previous studies on older volunteers focus on recruitment, retention, and motivation of the older volunteers (Kerkman, 2003; McNamara & Gonzales, 2011; Nagchoudhuri, Madhura, Prema Thirupathy, Morrow-Howell, & Tang, 2005; Tang, Morrow-Howell, & Hong, 2009). Some provide insights on how to maintain older volunteers in the organization, such as through ongoing training and placing volunteers according to their abilities (Tang, et al., 2009). However, few have discussed how to manage transitions among older volunteers when their declining health prevents them from continuing to volunteer.

Transitioning is a serious issue in the volunteer cycle, especially for older people. Transitioning an older volunteer does not mean simply “firing” someone because he or she cannot fulfill the volunteer mission. Instead, it is a process of assisting an older volunteer to decide whether to continue helping the organization by transferring to another position or terminate his or her volunteering services. It is a part of volunteer management that has not been much addressed in the research literature. Transitioning an older volunteer can involve ethical or legal issues. The manager could be accused if the older volunteer is terminated without reason. The volunteer’s family could accuse the manager of not respecting their loved one’s opinions and terminating their volunteer role against their loved one’s will. Therefore, respecting older volunteers’ opinions, and at the same time planning and discussing transitioning possibilities with them, is important for successful volunteer management.

In the summer of 2013, the John F. Kennedy Center for Performance Arts, together with the National Center for Creative Aging, held a workshop session for theater volunteer managers across the nation to discuss their experiences in working with older volunteers. The outcome of the workshop was that there is a need to develop guidelines on how to transition the older volunteers with appreciation and respect.

This research seeks to understand how theater managers see their relationship with older volunteer adults in the context of older volunteers’ transitions in theaters. This is exploratory research, whereby theater managers were interviewed about their experiences in working with older volunteers and about how they approach transitions when they are needed.

The overall goal of this research is to learn how theater managers recognize “the moment” when their older volunteers need to transition. Interviewees were asked to define their view of “the moment,” and follow-up questions were based on their responses, or their attitudes, toward working with their older volunteers.

The following specifics were addressed:

1. Define “older volunteer transitions” and the “moment” volunteer managers perceived as the right time to transition an older volunteer.
2. Explore the attitudes of the theater administrators on how they communicate with older volunteers about volunteer transitions.

3. Explore theater managers' working experience with older volunteers and how they assist older volunteers in transitioning within and out of the theater.

The results of this research add to the knowledge on managing older volunteers in non-profit organizations, especially organizations that have many older volunteers. In addition, this research can help to promote a better understanding of how people in volunteer management positions at performance arts centers perceive transitioning older volunteers.

Since volunteerism has gained its popularity among people of all ages, there have been numerous research studies on volunteerism and how it benefits people of different ages. Previous research suggests that volunteering is especially beneficial to older adults, physically and mentally. The following section provides an overview of the research on older volunteers and how transitioning older volunteers occurs in different volunteer settings. In addition, volunteer management, which involves transitioning older volunteers, is also discussed.

Overview of Older Adults' Volunteerism in the United States

Volunteers are defined as the people who work or provide services without receiving payment. Ho (2013) suggested that volunteerism is defined as any activity intended to help others without obligation and payment. According to a U.S. Bureau of Labor Statistics Report in 2013, 62.6 million Americans over the age of 16 (around 25% of the total population) volunteered in various organizations (Statistics, 2014). The data show that 24.1% of the older population (age 65 and above) volunteered in 2013. In other words, about 10.5 million older adults volunteered last year. Comparing all age groups in 2012 and 2013, only the age group of 65 and above had an increase in the volunteering population (Statistics, 2014)¹. The reason for this might be that the baby-boomer generation has now entered retirement age, and many of them have had volunteering experience and wish to continue. Another reason might be that the economic situation in 2013 was not as good as in 2012, so that working-age people struggled to earn money, while older volunteers were retired and unaffected by the economic crisis. With greater numbers of older volunteers assisting non-profit organizations in the United States, it is important for us to understand how these volunteers help others, and how we could provide the older volunteers a safer and more desirable place to volunteer.

People volunteer for various reasons. Younger people often volunteer for interest and to further career opportunities; middle-aged and older people tend to volunteer for social, personal growth, and altruistic reasons (Clary, 1999; Fischer, 1993; Okun & Schultz, 2003). Seguin and colleagues (1976) report that many of the retirees who contribute their time volunteering say they volunteer because they have more free time and want to meet other people (L. R. Fischer, Schaffer K. B., 1993; Seguin, 1976). Retirees who volunteer often are also those who have had high positions and high education before they retired (L. R. Fischer, Schaffer K. B., 1993).

¹ Although the percentage of older volunteers among the whole older population decreased from 24.4% to 24.1%, the number of older volunteers increased 0.2 million between 2012 and 2013.

Volunteerism can be one-time, short-term, or long-term, according to the needs of different organizations and the motivation of the volunteers. One-time and short-term volunteers help at either a one-time event or a place where services are needed urgently because of an event or temporary circumstance, such as helping people to reconstruct houses after a natural disaster or assisting at a children's performance in a local community center. However, this study focuses on those long-term volunteers who devote themselves to one organization for many years. These volunteers choose the organization they feel most attached to, and they serve for many years. Long-term volunteers require special and ongoing training according to the services they are expected to provide. It is necessary for them to be familiar with their jobs and the places they volunteer. Long-term volunteers are also described as having familiarity with the staff and patrons of the organizations as well. The close relationship between long-term volunteers and staff members has been often described as 'family' (Fisher & Schaffer, 1993).

Previous research on volunteering stresses the benefits, especially for older adults, such as better mental health, higher self-rated physical health, and delay of mortality compared to people who do not volunteer (Harris & Thoresen, 2005; Van Willigen, 2000). Prior research on older volunteers also suggest that older people engaged in productive events are less likely to become frail or disabled (Morrow-Howell, 2010) and that volunteering could lead to a higher life satisfaction and higher self-esteem for older volunteers (Smith, 2010).

Long-term volunteers in cultural organizations are thought to stay committed to their service because of the passion they have towards the specific cultural event. Common long-term volunteer positions in a theater or performing arts setting include ushers, greeters, ticket takers, and more. Volunteers in performing arts centers often began volunteering because of their interest in watching performances. However, reasons why they remain volunteering include ongoing trainings, good relationship with the staff and other volunteers, and the sense of belonging in the theater or performance arts centers. Ongoing training could provide a way for volunteers to gain new knowledge and, at the same time, ways to share this knowledge with the public. Maintaining a good relationship between the staff and volunteers also improves the volunteer engagement in an organization (Macduff, 2010). Moreover, staff and older volunteers in previous research have said that they considered the staff and other volunteers as their "family" (Fischer, 1993). They said that the friendly environment created by staff and volunteers made the place home-like; thus, more older adults wanted to stay as volunteers for the organization.

Volunteering in Theaters versus Other Organizations

Before going into the discussion about volunteering in theaters, it is essential to understand volunteering in traditional service-providing programs and how it is related to volunteering in a cultural organization such as a performing arts center. The following section discusses the characteristics of volunteering in RSVP (Retired Seniors Volunteering Program), in a long-term care facility, and at a performing arts center. There are rich resources on volunteering in RSVP and in hospitals, but very few research articles focused on volunteers in cultural organizations. Though the missions and

purposes of RSVP and performing arts centers are distinct from each other, the process of transitioning older volunteers can likely share the same format. When it comes to the certain point that an older volunteer can no longer perform his or her duties, one could argue that the result and approach in a hospital compared with a theater would be similar. The following paragraphs address existing volunteering programs and how they approach transitioning older volunteers in their organizations.

Retired Seniors Volunteering Program, known as RSVP, has a long history of providing opportunities and training retired people to perform different roles that assist the growth and well-being of their communities. RSVP was established in 1969 and is now under the National Corporations of Community Service and Senior Corps. The volunteers have to be age 55 and over to apply for roles in the community. They must complete orientation and training before starting their volunteering jobs. There are a variety of jobs that can be done in the community by volunteers, such as tutoring and mentoring disadvantaged school children, renovating homes, or assisting victims of disasters (Senior Corps, 2008). The volunteers have to sign contracts with RSVP and receive training in their local community in order to provide services. In a phone interview done by this researcher for the National Center for Creative Aging in 2013, the administrator of RSVP reported how they transition the older volunteers who no longer think they are capable of volunteering. The administrator described that they have constant training for all volunteers in their program. Once the volunteers feel they cannot continue volunteering, the older volunteers are required to have a face-to-face discussion with the staff and trainers about their next goal in life. The discussion results with the RSVP manager include training future incoming volunteers or terminating the volunteering role.

Hospitals and long-term care facilities are known to have many older volunteers. These two places depend heavily on volunteers to assist in multiple tasks with the patients and other offices, and coordinating the visitors and patients' family members. It is often quite easy for volunteers in a hospital to transition to other positions within the hospital, since there are many volunteer positions available for various skill levels. It is possible for the older volunteers to be transferred to another position that requires less physical ability when the older volunteer cannot stand for a long time or lift heavy equipment.

Despite the information on RSVP and hospital volunteering programs, very little research on volunteering has been done with cultural organizations such as museums, libraries, zoos, or theaters. Most publications for volunteers in cultural organizations are guides for people to learn about opportunities for volunteering in a museum or in a library (Hirzy, 2007). The older population makes up the highest percentage of volunteers holding usher and greeter positions among all age groups. In other words, there are more older people who would like to volunteer in a theater, compared to volunteers in other age groups. Serving as an usher can be difficult because it requires both physical and cognitive ability to do the job well. Ushers must be able to stand for a long time, interpret tickets, and lead patrons to the correct seats. It is said that many people with high levels of education and high economic positions enjoy volunteering in cultural organizations (L. R. Fischer & Schaffer, 1993). Therefore, when people who enjoy volunteering in the theater start to have difficulties while volunteering, the managers have to know how to assist them while

they still show strong interest in delivering the services. Having a program or process for successfully transitioning the older volunteers becomes important. The following paragraphs define volunteer transitions and the different types of possible transitioning approaches.

Meaning of Volunteer Transitions

The word “transition” means change in status. A transition can happen many times in a person’s life. Life transitions are mostly tied up with role changes in family, community, or society—for example, graduation, retirement, or becoming parents or grandparents. However, transition in the context of a volunteering organization means the act of changing one’s volunteering role to another, or of simply terminating one’s volunteering responsibility. There are reasons for changing volunteer roles or ‘retiring’ volunteers based on their performance. Unlike paid employees, the process of retiring an older volunteer requires more thought, because the reason they came to help constantly is that they wanted to. It is not easy to stop or to terminate one’s interest in being a volunteer, which leads to the main research question in this study: to explore what theater managers have done in transitioning their older volunteers.

Transition can be self-initiated or be guided by others in the organization. Self-initiated transition happens when the volunteer no longer wants to continue volunteering due to various reasons. He/she discusses either transitioning to another position or terminating the volunteering role with the volunteer coordinator. On the other hand, guided transition happens when the staff member or other volunteers discover someone having a difficult time with their volunteering job, which they report to the manager for further transitioning assistance. Guided transition can also involve transitioning to another position or terminating the volunteer. The result depends on the decisions made between the older volunteer and the volunteer manager. Nonetheless, if the older volunteer is not able to make decisions for himself or herself and becomes a safety hazard for the theater, the volunteer manager still has to talk to the older volunteer about the situation and further transitions or termination.

Moreover, ushers and greeters in a theater have to be fully cognitively aware of their mission and their locations. Risks could occur if older volunteers start to lose track of what they are doing and where they are going. Unlike volunteers in a hospital, theater ushers, most of the time, have to climb stairs and show people their seats. When this mission cannot be continued by a particular volunteer, but he or she is still highly interested in volunteering in the theater, the volunteer coordinator may need to decide whether to continue with the volunteer, change his or her role, or have them leave the organization.

Volunteer Management

Volunteer management and transition involves many aspects of human resources. From recruitment to training, and to retention and turnover, every aspect of volunteer management requires a well-organized plan in order to overcome different situations. It is important for non-profit organizations to set up regulations and policies on managing their volunteers in order to achieve their mission to serve their target audiences. In this

study, the researcher focuses on discussing three aspects that directly affect the transitions of older volunteers in theaters and performing arts centers. The three aspects include recruitment and placement, risk management, and communication. As mentioned earlier, older volunteers tend to be long-term volunteers and committed to the organization. Volunteer managers who would like to sustain a good quality of volunteers and provide them the best working atmosphere might need to consider how to design and implement these three aspects according to the characteristics of the organization and the expectations of their volunteers.

The main reason recruitment and placement are important is that once the right people are recruited and placed in the right position, these volunteers have a higher chance of remaining for a long time and of bringing a positive influence to the theater (Fischer & Schaffer, 1993). The theater director and volunteer coordinators have to know what kind of volunteers they are looking for and how to recruit them. Willingness to volunteer in the organization cannot be the only criterion of selection; sometimes, certain skills such as physical capability or personality also determine whether someone would fit as a volunteer in the group (Hirzy, 2007). Knowing who to recruit and how to place volunteers in the theaters will save a lot of managers energy once volunteers start training and working. Setting up clear policies in volunteer handbooks could provide the volunteers with rules to follow once they are recruited.

The second issue of older volunteer management is identifying the potential risks for the older volunteers in the work they do. According to Graff (2011), risk is defined as a potential loss or harm. It could directly or indirectly affect the performance of the volunteers, the organization, and the participants. Organizational policies and handbooks are the primary risk management devices (Graff, 2011). Potential risks can be prevented when the rules about volunteer discipline are stated clearly in the handbook. Potential risks in theaters include older volunteers falling off the stairs, getting lost while leading patrons to their seats, and their inability to evacuate audiences when real emergency situations occur. The director and volunteer manager have to think about the working responsibility of volunteers and the liability of their work. Graff suggested that screening of volunteers before they start could forecast potential risks brought by the volunteers, and risk management could identify the risks presented by the working environment; thus organizations can control and mitigate the risks (Graff, 2011). If the potential risks of volunteering in the theater are controlled, the older adults could therefore have a better volunteering environment and commit for longer periods.

The abovementioned volunteer management methods apply to all organizations receiving volunteer work. In terms of managing older volunteers who enjoy helping and watching performances, once these volunteers start to show signs of risks and memory loss, the volunteer coordinators and other volunteer managers should know the kind of approach they should take in order to make sure the older volunteer is safe and, at the same time, not affecting other volunteers or patrons in the theater.

In summary, transitioning is one important aspect in managing older volunteers in the organization. Transitioning is related to the liability of the older volunteers; at the same

time, it is about risk management in the theater. Risk management is not only for the organization but also the health of the older volunteers. If transitioning the older volunteers is done well, not only is the relationship between the volunteers and the organization maintained, the older volunteers also can and will be willing to come back to support the theater in the future. In conclusion, if transitioning the older volunteers is done well, it will benefit both the theater and the older adults.

Chapter 2: Methodology

A qualitative research design was selected in order to learn the attitudes and perceptions of volunteer managers toward older volunteers in theaters and performing arts centers across the United States. A variety of research studies exist that use secondary data analysis to understand volunteering management and transitioning, but there is a gap on understanding how volunteer managers perceive transitioning their older volunteers. Volunteer managers in theaters and performing arts centers were recruited and interviewed by phone. Data about volunteer managers' experiences working with older volunteers and their managers' attitudes toward the idea of "volunteer transition" were collected through in-depth interviews. The following is a detailed description of how this research was conducted, from the recruitment of subjects, interviewing process, data collection, to analysis.

Participant Recruitment

This research used three sources to recruit volunteer managers in theaters and performing arts centers: survey respondents to a national survey, conference attendees, and snowball sampling from participants. The national survey was conducted by the National Center for Creative Aging (NCCA) in Washington, D.C., in May 2013. It was designed for volunteer coordinators in arts and cultural organizations such as museums, libraries and performing arts centers. The specific questions and aims involved managing the older volunteers in these organizations. The researcher gained the approved access of the contact information of the survey participants from NCCA in summer 2013. Individual emails with consent forms were sent out, inviting and explaining the research to the theater volunteer coordinators who took part in the NCCA survey. In the end, of the NCCA national survey respondents, 5 were from performing arts centers. Of these, 3 agreed to participate the current study.

Besides the survey, another major source of interviewees came from two conferences with theater coordinators and directors who were interested in transitioning older volunteers. The two conferences were: the Leadership Exchange in Arts and Disability Conference (LEAD) in August 2013, and the Association of Performing Arts Presenters conference (APAP) in January 2014. The workshop in the LEAD conference was co-hosted by the John F. Kennedy Center for the Performing Arts and the National Center for Creative Aging (NCCA) in Washington, D.C. The majority of attendees for this workshop were staff members from a theater or performing arts setting. The NCCA staff presented the result of the abovementioned national survey at the workshop. A list of the participants was recorded with their contact information. The researcher contacted the participants from the workshop through email and phone calls in January 2014. After ascertaining their interest in taking part in the research, further emails with research questions and a detailed research explanation were sent to the potential interviewees. Two interviewees were recruited from the LEAD conference.

Another participant of the research was recruited in the SHINE conference held by the Association of Performing Arts Presenters (APAP) in New York City. The conference was designed for performers and staff in theaters to meet and collaborate. In this

conference, NCCA invited volunteer coordinators and theater directors to join their session on the results of the workshop in the LEAD conference from the previous summer and to discuss their experiences with transitioning older volunteers. With the assistance of NCCA, the researcher gained the opportunity to recruit theater directors and volunteer coordinators through this session. One director from a performing arts setting was recruited through email and phone calls in conjunction with this conference.

Five other interviewees were recruited using snowball sampling from the previously mentioned interviewees. They all were volunteer managers (e.g. house managers, volunteer coordinators, or directors, depending on their job titles) who worked closely with older volunteers. They were initially contacted through email first to ascertain their interest in taking part in the research. Phone calls were then made to schedule the time for the interviews. The final interviewee was recruited through the help of one volunteer coordinator in a performing arts center in the Midwest. The coordinator posted the researcher's contact information on an Internet forum for theater volunteer coordinators. The final interviewee contacted the researcher regarding her interest of being part of the research. Further emails with detailed research information and research questions were sent in preparation for the in-depth interview by phone.

Data Collection: Phone Interview

The study used a semi-structured, in-depth phone interview with the volunteer managers. Predetermined questions on transitioning older volunteers were sent in advance to the theater volunteer managers, so they could review them prior to the interview. All of the interviews were conducted by phone. This research covers theaters and performing arts centers across the United States. Thus, it was more appropriate to conduct the interviews by phone because of the variations in theater locations; i.e., some of the participants are in the East Coast and some of them are in the West Coast.

Before scheduling the interviews, the details and purpose of the research were explained to each participant through emails and phone calls. If the volunteer manager agreed to take the phone interview, a confirmation email was sent out to schedule a mutual time for the phone interview (Guest, Bunce, & Johnson, 2006). The recruitment letters, consent forms, and research sample questions were sent to the interviewees at the same time the interviews were scheduled. Each interview lasted about 30 to 45 minutes, and every interview was recorded for transcription and analysis (Richards & Morse, 2013).

The interview contained 8 questions (See Appendix 1). Each question aimed to explore what volunteer managers think about the older volunteers and how they transitioned them. Some questions had follow-up questions, and some were open-ended questions that would help the interviewees to think further about their experiences working with the older volunteers. After asking the 8 prepared questions, the volunteer managers were invited to share anything else related to managing or transitioning the older volunteers in their theaters. Some interviewees also provided other potential participants for the research, five of whom later became interviewees in this study.

More than 20 participants were contacted, but only 12 managers were interviewed. The reason for having only 12 interviews is that the researcher discovered the interview contents reached repetition in the 10th and 11th interview. According to Richards and Morse (2013), saturation is attained when the answers provided by the house managers and volunteer coordinators became redundant and could not generate different perspectives and responses by the addition of other respondents (Richards & Morse, 2013). Therefore, the interview recruitment terminated after the 12th individual was interviewed for this study.

Analysis and Interpretation

All of the interviews were transcribed and carefully examined by comparing notes taken during the recording as well as by repeated listening to the recorded files to check the accuracy of the transcribed files. A professional transcriber was hired to transcribe all interviews. Analysis began after the transcripts were transcribed and checked. The following sections discuss how the researcher conducted the analysis through coding and finding themes between the transcripts.

Coding

Coding was the first step of analysis after interviews were ready for analysis. Codes are created based on relevant content describing the same situation or experiences that display important messages about transitioning the older volunteers in theaters. The codes can appear in individual sentences and also in one or more paragraphs that describe a situation. One paragraph can also attain more than one code when the responses include more than one meaning. The same codes were assigned to content when similar experiences or particular situation happened in different parts of one interview or in different interviews. For example, when interviewees described how they observed their older volunteers having arthritis or not being able to stand for a long time, the code 'standing issues' would be used. All codes were defined and were gathered in a codebook (See Appendix 2), which was used to further refine the codes for analysis.

In the process of coding, memos were created. The process of writing memos enables the researcher to have a better understanding of the data collected through the interviews (Richards & Morse, 2013). Memos also help the codes and themes in the interviews to become visible. Possible codes appear as topic codes and description codes in the transcripts. When similar codes are gathered together, a theme is developed from the common characteristics of the codes.

Themes

Themes are created based on the research questions and the codes that share common explanations. Codes are the primary units of themes, and when more than one code is categorized into a bigger category, themes are distinguished within the categories. Emerging themes help the researcher to see the possibilities of naming and grouping them together into a bigger framework. The researcher thus understands how to interpret the bigger theme and what volunteer managers in the theaters said in common.

This research used Braun and Clark's (2006) thematic analysis method to find the themes from coded transcripts. They provide very clear steps on how to do thematic analysis. They suggest step-by-step instructions, from familiarizing oneself with the data, to coding and finding the theme, and then deciding how to arrange the themes into findings. The rich thematic description of the entire dataset produces a full picture of the basic themes that keep coming out in the transcripts (Richards & Morse, 2013). For example, 'Reason for Transitioning' is a theme that appeared after gathering all codes related to why interviewees decide to transition their older volunteers. Under this theme, sub-themes emerged as categories, which contain different transitioning reasons in the theaters. Categories under 'reason for transitioning' include physical decline, mental decline, and attitude issues. Each category explains how their contents are related to the theme. After all the analysis, three main themes were brought out, and each has at least two minor categories for in-depth explanations.

Chapter 3: Results

Based on the 12 interviews, volunteer transitions were grouped into three main categories, each with sub-themes. These three categories are based on the research questions (Appendix 1) and answers from the interview data. The three main categories are following:

- Reasons for volunteer transitions
- Experiences with transitioning older volunteers
- Transitioning approach

The following sections discuss each category and the themes derived from the collected data.

Reasons for Volunteer Transitions

According to all 12 interviewees, there are three main reasons to transition a volunteer: physical decline, mental decline, and negative attitude issues—rather than chronological age. The interviewees believe that it is not proper to transition someone out simply because he or she is older. Older volunteers may have declining health, but this may not necessarily affect their volunteer performance. Interviewees mentioned that some older volunteers are highly regarded as outstanding, long-termed volunteers who do a phenomenal job and have served the theater for many years. However, some interviewees described very dangerous situations, such as when an older, long-termed volunteer suddenly got confused on the stairs or a volunteer who almost took a fall from the stairs. The following three sections describe the three main themes in more detail.

Physical Decline

The theme “physical decline” describes situations in which interviewees talked about their older volunteers having physical impairment such as leg problems, hearing or vision decline, and lack of stamina. Many interviewees regarded physical decline as a minor issue in transitioning older volunteers. Many stated that if the older volunteer cannot stand long, another job would be found as long as the older volunteer expresses his or her wish to continue volunteering in the theater. For instance, one volunteer manager transitioned her older volunteer who showed difficulty in standing to a position that allowed the volunteer to sit while she helped with tickets and merchandise. Another interviewee also asked her older volunteer to assist her with mailing and calling other volunteers to remind them about their volunteer schedules.

However, if the older volunteer is experiencing vision or hearing impairment, it becomes another issue in physical decline. One interviewee described an older lady who started to have failing vision and could not volunteer in the evening. However, almost every performance in his theater is in the evening, so that the manager could not schedule her at all. The volunteer manager had several conversations with the older volunteer about other opportunities and her availability during the daytime. The result of the transition was that the volunteer manager stopped scheduling her because there was nothing available for her to do in the theater. From this case we can see that even though the volunteer manager

and the volunteer discussed the transitions together, it is possible that the volunteer has to be transitioned out due to their health condition and lack of volunteer positions in the theater.

Mental Decline

The theme “mental decline” includes descriptions about older volunteers having cognitive issues. For instance, several interviewees described older volunteers who had dementia. Seven interviewees described having volunteers who showed signs of memory issues and confusion during volunteering. Memory issues, for example, are the stories that involve memory loss, cognitive unawareness, and lost sense of direction. Interviewees regarded older volunteers who have signs of confusion and memory loss as “safety hazards” They are worried about these older volunteers hurting themselves while volunteering or affecting the patrons during performance. The following are more detailed descriptions of situations in which older volunteers had memory loss, cognitive unawareness, or other safety hazards.

Memory Loss

Memory loss include situations in which interviewees described long-term, older volunteers who gradually lost the ability to perform their volunteer job. For example, one interviewee described his observation of an older volunteer who lost track of time, so that the volunteer was unable to help with the newsletter. Similar experiences appeared in other interviewed theaters. The following is a story told by one interviewee about her older volunteer showing signs of dementia after volunteering for decades.

Mrs. A was a long time member and supporter of the theater. She was actually one of the founding members of one of the community theater companies in the area... She was there for decades. And few years ago, we took over the operation of that theater. She worked with us for about a year and then she quickly started showing signs of early onset Alzheimer's for dementia. She was becoming very confused. If our arrival time was 6:30, sometimes she would show up at 7:30. Sometimes she would show up at 5:30 and she was not always knowing what show was going on even if I told her what was happening. We have two different dress codes. She was beginning to not remember the dress code... It was clear she would be standing in the middle of the aisle and she would suddenly forget what she was doing which was showing people to their seats. And another volunteer would have to say, “Mrs. A. Do you need help? What were you doing?” And Mrs. A would say, “I can't remember,” or “I was showing them to their seats but I can't remember where I am.”

So I started to move her to different positions that don't require a lot of memorization or things that were easier. But eventually I had to involve the family. I looked up her...children and I looked up her son in the phone book. It was a cold call. “I'm sorry. We've never met. However...” And I told him the situation. The family was very grateful that I reached out because she would always put on airs that she was very independent and she was fine. Her family didn't realize to what extent, how real world these symptoms were exhibiting. You know what I'm saying? That's happened a couple of times with different people.

The above story involves transitioning a long-termed older volunteer due to memory loss. The description shows that she could not make decisions for herself as she used to do, because she could not recall where she was and what she was doing. Even though the interviewee tried to transition her to other positions, at last the older volunteer had to be transitioned out through the assistance of family members. The next section includes an example with another older volunteer with mental decline who was not aware of her own condition.

Cognitive Unawareness

Cognitive unawareness includes situations in which the interviewee discussed the transitioning possibilities with the older volunteer, but the volunteer denied and/or was not aware of his or her condition. Four interviewees said they had a hard time explaining to some older volunteers and their families that there may be cognitive issues with the volunteer. The following part is about an older couple who have volunteered for many years, but the wife has started to show signs of mental decline.

There was a couple... I think it made it really difficult for them when the wife, D started to fail pretty quickly mentally, but physically not at all. So that was a tough one, because not only was she not recognizing it, but he was kind of in denial about it too. Anyway, so once it was clear to me, I realized I couldn't put them on the schedule. And quite frankly, I prayed about this. I agonized over this for a long time, and I knew I had to tell them that at least one of the two couldn't volunteer anymore. So I offered them a different position.

It was one of those days in the office ... She said, "No, you're trying to get rid of me." I said, "No." She walked very briskly about 10 feet away and turned and said, "See, I don't have any problem at all. I'm doing just fine." And I said, "Oh, you walk really well. That's true... But you know, I have an idea for us, though. Let's try something. Would you mind if we went into the theater right now?" "No, let's do it." I handed her the tickets and she looked at it, just stared at it and looked confused. So, "What's it say there?" She reads it and says okay. "Now, all you really need to look at now is the section, the row, and the seat. So you really don't even have to look at any other information." I said, "Let's just look at that. What does that say?" She looked confused, so I went ahead and pointed at it and said what it was. "6-G-5." I said, "Okay, so that's section six, row G, seat five." "Okay." "So what section are we in?" She just stared at it and I said, "Okay, there's my ticket. Take me to my seat." She turned and looked at her husband like, "Help me out with this." He wanted to, he started to, and I shook my head and said, "I'm sorry. But this is for D. You're not always going to be there when the patron comes up." ...

The above quote from the interviewee provides insight into the conversation between the older volunteer and the volunteer manager. It was very difficult for the interviewee to decide whether or not to tell the husband or both of them about D's situation. However, the most difficult part of this transitioning experience was the moment when the volunteer manager had to determine how to tell their family about what happened in the theater. Another common concern from several interviewees is when their older

volunteers started to have a hard time doing familiar activities, such as driving, which is discussed in the following example.

Volunteer Safety

Volunteer safety is strongly connected with older volunteers' driving difficulties and other safety issues, such as getting lost inside and outside of the theater. Three interviewees regarded transportation as a major problem; thus they have to transition the older volunteers, since the theaters or performing arts settings are located in a place where people have to drive in order to reach the building. Driving has become an issue for volunteer managers to consider in deciding whether the older adult can continue to volunteer. When the older volunteer showed difficulties with driving, the managers and staff would try to accommodate them with other means of transportation, unless the older person has similar experience as the following story:

I did have one lady who was very forgetful, and she's sweet, very sweet. She would forget from the time we told her what floor to go to, which was no more than two or three minutes, and she would forget... So I started watching her a little more closely. And one night she got here very late and she said she made a wrong turn coming to the theater. She was driving still. So I called her husband saying she got lost coming to the theater. And he originally said he thinks she might be fine going home... but he called me the next day and said she was going to quit, because she got lost coming home, and the police had to take her home...

Being lost on the road or in the building both create safety concerns for the volunteer coordinators. Safety issues not only influence how coordinators view older volunteers, it also affects whether the older volunteer is capable of continuing to volunteer in the theater. It is possible that the volunteer who forgot the way home would also get lost in the theater and hurt himself or herself. Volunteers with mental decline are much more difficult to transition compared to those with physical decline. The reason that connects the three stories together is that mental decline could pose dangers to the older volunteers and the patrons at the same time. Therefore, when interviewees said they have experiences of transitioning older volunteers, most of them would talk about volunteers with mental decline and what they did for the transitioning experiences.

Negative Attitude Issues

Negative attitude issues describe the situations when interviewees described their older volunteers being rude and stubborn, complaining more than providing services, and yelling at patrons or staff members during performances. Several interviewees talked about having older volunteers with bad working attitudes in the theaters. It was difficult for theater staff members to work with the older volunteers if their negative behavior continued. Moreover, some older volunteers were considered by staff to have spent more time complaining than working. In summary, when older volunteers go through negative emotions while volunteering, interviewees regarded this as the time to let go of people who could not enjoy volunteering in the theater. Some examples of older volunteers with bad attitudes are included the following paragraphs.

Reluctant to Listen and Change

Some interviewees described having older volunteers who were unwilling to listen to the younger staff members while volunteering. They said that these older volunteers have their own opinions towards everything, and they do not want to follow the suggestions made by others. However, some other interviewees talk about having older volunteers not being careful of themselves. Volunteer managers and staff know the extent an older volunteer can work, according to their health condition. They might suggest the volunteer to stop working in one position, but the volunteer refuses to give up. The following is a quote describing an older volunteer who would not give up and ended up hurting herself.

... I've had a few that, they're die-hards. They go, "No, no, no, C. I'm fine. I'm fine." We had one lady who was having a hard time doing stairs, and I said, "You know, you have to be able to go up and down stairs, because we can't be concerned about you. Because you're supposed to be helping the patrons who can't go up and down the stairs." And she said, "No, I'm fine. It'll be okay." A few weeks later, she fell. And broke her ankle. And we both said afterwards, when I went to talk to her, waiting for the medic to arrive, she said, "I guess I should have listened to you then." But it was too late. She just couldn't bring herself to give it up. She loved coming here. For a lot of these people, it's a social outlet.

From the above story, we can see that the volunteer manager is worried about her older volunteer, but the volunteer refuses to stop. The volunteer manager here must have seen the difficulty that her older volunteer has on the stairs. This case suggests that volunteering can provide an enjoyable social outlet. However, potential risks hide within the facility and with the older adults themselves, as they push themselves too hard, ignoring their health conditions and physical ability. Other interviews describe similar stories in which their older volunteers are reluctant to make changes. Some interviewees regarded these volunteers as difficult to work with. According to one volunteer manager, these older volunteers who cannot follow the theater volunteer regulations tend to stop coming to volunteer. However, those older volunteers who like to try new things and are not afraid of using new technology are more likely to stay.

Anger Management Issues

Some volunteer managers described situations in which they have sent the older volunteers away from the theater (temporarily or forever), which mostly centered around the volunteers' rude behavior and attitude towards other volunteers, staff members, or audiences. In such cases, the managers interviewed those who witnessed the conflict or misbehavior, and then decided whether the volunteers' attitude or actions affected the quality of service they provide. If an argument happened during the performance time, the coordinator might ask the volunteer to go home directly. The following story happened in one theater and shows the conflict between two men who cannot get along with each other and were scheduled to volunteer on the same day:

...Two short guys, both very, very well-educated, both were in management for their whole working career, both retired now, and they don't like each other... Well, one night, right before a show started, they decided that they were going to duke it out... So I have to

pull them back... to talk to both of them. I said, "Come on you guys. Someone's going to go home or both of you are going to go home." "Well, he can't talk to me like that. I'm 65 years old." "I can talk to you however I want. I'm 72!" You know. So I have two little boys arguing. So I give them an option for one of them to go home and one of them to stay, which of course that wasn't going to happen. They were just going to ignore each other. I said fine, and everything was good. However, after that, I never worked them together.

With this story in mind, we could see that transitioning happens when the volunteer exhibits bad attitude towards other volunteers, staff members, or patrons of the theater. This volunteer manager says she would never schedule these two people together again. This is one case in which the volunteers did not act appropriately in relation to other people.

All stories above comprise the common themes on reasons for interviewees to transition older, as gleaned from the 12 interviews. These examples suggest that volunteer managers transition older volunteers mostly because the volunteers would harm themselves or others while volunteering. However, transitioning experiences differ depending on the attitude of the transitioned older volunteers and the volunteer coordinator's communication with the volunteer and their family members.

Experiences with Transitioning Older Volunteers

One main research question of this study explored volunteer managers' experiences on transitioning older volunteers. The interview content on such experiences can be divided into three themes: good experiences, negative experiences, and no transition experience. Volunteer managers were very willing to share their experiences on working with the older volunteers.

Many interviewees described happy memories of working with their older volunteers. They considered the older volunteers to be helpful, committed, and part of their "family." There are some examples of volunteer managers' pleasant experiences with assisting older volunteers to transition from one position to another within the theater, and also out of the role of volunteering. The common theme for a good transitioning experience is that the older volunteer understands and accepts the fact that their health condition is declining. Such an older volunteer brings up his or her own condition with the manager and asks whether he/she could help with other volunteer positions. For example, some interviewees describe how their long-term volunteers started to have arthritis and wanted to change to a position where they could sit and help. As long as the conversation between the older volunteer and the volunteer manager was good, it was considered as a good transitioning experience.

Good Experience Transitioning Older Volunteers

Transitioning is considered as a good experience when the interviewees regarded the transitioning experience as peaceful and pleasant for both the coordinator and the older

volunteer. For most volunteer managers who talked about good transitioning experiences, the most important thing in transitioning is the “dialogue” between both the manager and the volunteer. The dialogue has to be a successful two-way communication, which involves the decisions of whether the older volunteers want to continue or terminate volunteering. The following quote is from one interviewee talking about one of her older volunteers who started volunteering when she was 81 and gradually transitioned herself out of her volunteering role in her 90s.

Mrs. D is now 91 and she started volunteering at the age of 81, which in itself I thought was kind of amazing... as she approached her 90th birthday, she started having difficulty standing... first it was about the stairs’ problems and so she didn’t usher up and down the aisles. Instead, she would usher at the ticket box, where she would greet people and make sure the ticket was the right one for that day, for that performance, and send them to the correct door... she actually came to me and said that she wanted to continue to volunteer, but that she needed a different job, because she was having difficulty with standing. She came to the office. I was behind in filing. I was behind in having to winnow through all and decide what was important and what isn’t and what should be archived and what should be shredded. She was willing and able and did a phenomenal job helping me with that for the last year, or more. A year and a half now. Recently, she’d been ill for a while so she’s at home now, but if she comes back, it will be in a way that works for her, and works for me. It’s really important that we are not patronizing to our volunteers in giving them work that’s not real work. Because we’re not the Red Cross of volunteers – we’re not doing charity work for the volunteers. It’s not my job to make a volunteer feel needed. It’s my job to have them actually fulfill a job and have a need, and if that’s the case, I should appreciate and acknowledge them. But their feelings are not my responsibility... She has expressed concern as she’s gotten older. She’s said to me one day, when we were going over some of the files of former volunteers, she said, “If I ever come to the point where I don’t realize I really can’t help anymore, please, let me know. Don’t patronize me or don’t humor me”...

From the above story, we can see the interviewee considered the discussion about transitioning with her older volunteer as beneficial for maintaining their relationship afterwards. An important aspect is that transitioning here happens in a two-way conversation between the manager and the older volunteer. Apparently, this older volunteer was very committed and helped the interviewee a lot. The older volunteer expressed her interest in continuing to help the theater, and the manager respected her wish to provide other jobs that are also helpful and productive. The transitioning experience in this case is very successful, and there is nothing that made either the manager or the older volunteer feel awkward or unhappy.

Bad Experience Transitioning Older Volunteers.

Bad experiences occurred when the interviewees said they had a very unsuccessful dismissal experience when terminating an older volunteer. Common bad experiences shared the same characteristics of the interviewee feeling awkward, sad, and unpleasant after dismissing the older volunteer. Many older volunteers were considered to have cognitive unawareness issues. The volunteer managers regarded them as not being able to

realize what situation they were in. In this situation, the older volunteers may hurt themselves or others in the theater. Two interviewees said they had been accused by the family members of the older volunteers for letting their loved ones go because of having declines. The following is an example of a bad transitioning experience told by one volunteer manager.

...they're getting to a point and I would say probably my least successful dismissal happened when I was still ...in a different theater company and the husband had, I don't know if it was dementia or early onset Alzheimer's, but he was not with it anymore. That theater had a lot of stairs that they had to work around and it just. I was so petrified that he was going to get confused on the stairs and turn and slip and fall. He couldn't remember where the rows were in the theater to get people seated. He basically was just a liability. I was literally making up jobs. "Go stand in the corner and look at the wall. That's what I need you to do." Because he was not being helpful. He'd lost that ability and I sat down with him and his wife, because it was a couple, and I started explaining the things that I was seeing about he wasn't remembering rows and he was having difficulty on the stairs and interacting with patrons was getting more and more difficult.

She denied the whole thing. "That's ridiculous. You're being silly. You're out to get us. You're going to..." Blah, blah, blah, blah, blah. "You're just being horrible to my family. And this is ridiculous." I'm sitting there going, "I can't, I'm sorry." It would have been one thing if her reaction had been less we could have transitioned him out and had her remain ushering. But when she exploded in my office, yelling at me and I'm like, we're really done now. Both of you are finished for now. She ended up calling the artistic director of that theater to say that I had dismissed her... I can't remember how she phrased it. But basically saying I'd done it wrong. I was treating her wrong and I was being mean to her and the artistic director stood behind me and said, "You know. This is the reason." ... That was probably my hardest firing ever, ever, ever.

Based on this interview, it is clear that the interviewee wanted to help and knew that the older volunteer wished to continue his volunteer work. However, when the older volunteer reached a point where he risked hurting himself because of being confused and losing track of what he is doing, it was very dangerous both for the older volunteer and the performing arts center. What made the interviewee feel that transition was hard was the discussion with the wife about her husband's condition. This is not the only case in which the interviewee cites spouses covering up their loved ones' health condition (especially mental health like dementia). The solution is unpleasant, and the interviewee learns to keep notes on every piece of evidence that prevents the older volunteer from volunteering. She especially notes that transitioning should not be affected by the coordinator's mood, but is done because of valid concerns about the older volunteers hurting themselves if he or she continues doing the same volunteer position.

No Transition Experience and Reasons.

No transition experience means the interviewees admitted that he or she had no experience with guided transitions with any older volunteer, either out of the volunteering

role or to another position, because of the volunteer's age. Three volunteer managers admitted to never having to actually dismiss someone from their volunteering job. However, it does not mean that these interviewees had never experienced an older volunteer that showed signs of decline or required extra assistance. Some volunteer managers used a different approach to help the older volunteers to continue serving the organizations.

These three volunteer managers had very different experiences working with the older volunteers and had distinct reasons for never having to transition anyone out. One director discovered that his older volunteers had memory problems and could not remember the contents he put in the newsletter. The method that this interviewee used is to find another person to assist the older volunteer after he completed his part and to cover what he left out in the newsletter; another interviewee had encountered her regular older volunteers who came with a cane, but it was not a problem with her older volunteers not being able to serve. She allowed all her volunteers to sit while watching the performances. This interviewee also said that she would introduce an emeritus program to appreciate her long-termed older volunteers who could no longer volunteer for her program.

The third interviewee regarded his theater as having so many volunteer positions for older volunteers to choose from that he did not have to transition them out. He said his older volunteers were so upfront with their physical conditions, that once they felt they could not continue doing one job, they would go to the coordinator, asking for another volunteer position. The following is a quote from this interviewee about his older volunteers and how he does not have to transition them:

I haven't ever really had a situation with a mental capacity issue, where they were losing a step or something and couldn't remember things that we had to figure out. That hasn't come up yet. And the physical part of it, I've been really lucky to have folks who kind of almost from initially when they first start volunteering tell me what. We offer enough different ways to help out... and we have different stuff that works, depending on their experience and limitations and also their personality... I don't want to just (the volunteers) sign up to volunteer... We want them (the volunteers) to also be a part of deciding what they want to do and how they want to do it.

From the quote above we can see he has not had older volunteers with dementia in his theater. The main reasons that this interviewee has never transitioned older volunteers out is because he knows what his volunteers are going through initially and can assign different volunteer positions to the older volunteers if they still have the passion to help out in the theater.

Transitioning Approach

Transitioning approach describes the methods the interviewees used to transition older volunteers in the theaters. Transitioning approach is a process, instead of a common method. One major theme that flows across the beginning of recruitment to the end of transition is communication (Figure 1). Every interviewee talked about how important it

is to communicate with the older volunteers. With continuous conversation with their older volunteers, the interviewees could understand more about their older volunteers and their emotional change and health condition. One interviewee described how important she thought communicating with her older volunteers was and how she communicates with her volunteers as follows:

Like I said, when somebody has a problem, I do take them aside. Whether it's a physical problem or a mental problem or just the commitment part. If they can't make it, to the commitment. You know, some of them have to change – they may be doing an evening, but now they can't drive at night, so they're doing a matinee. Things like that. So we talk to them. I talk to them and I try to explain to them, if they've forgotten what the rules and procedures are. And make sure they understand what's expected of them, and make them part of that decision making process on whether to stay or leave.

Based on the above example, communication is important throughout the process of transitioning. The interviewee describes talking to the volunteers once she discovers problems and then discusses transitioning with the volunteer. Whether it is transitioning the older volunteer to another position or stopping the volunteer from continuing his or her service, the decision to transition should be made together with the older volunteers. Another important part of the transitioning decision-making process is clarifying the expectations of the manager and the volunteers. If the communication between the volunteer and the manager is well established, transitioning can be made accordingly to meet the expectation of both sides. One volunteer manager brought out how she thinks communicating about the expectations both from the theater and the volunteer is important. Clarifying what is expected and what can be expected can improve understanding between the volunteer and the theater. Following is the quote that describes what she considered important in volunteer management and transitioning.

Be clear on our expectations and be clear about whether or not someone meets those or not. If they don't, help them to meet them by clarifying, training, whatever it takes. If they continue to not do that, then we have to make a decision about what we want to do. If they're willing to try something else or if they'd rather just terminate their relationship or we'd rather terminate it.

Based on what is said in the above quote, transitioning is all about having the conversation with the older volunteers. Without proper conversation with the older volunteer, it is impossible to deliver the kind of transition according to the capacity of the older volunteers. In addition to having a conversation with the older volunteers, interviewees also said taking notes or having records of volunteer performance could help them when it comes to transitioning someone. The following quote came from one interviewee who had what she considered a bad transitioning experience and who learned this method to assist her in justifying transitioning reasons.

... I always have notes and I write a letter to say this is what we talked about. Same as you would dismiss an employee. Because with ushering, with volunteering, it becomes this grey area. Am I letting them go because I'm having a bad day? You know, you're

bugging me today, you're fired. You're done. Or is there a reason? And if I have notes in the account and I have a written letter to them and I have face-to-face conversation with them, I at least have some supporting documentation that says this is why I let you go. Instead of going, "Hmmm, you wore blue. I don't like blue. Be gone."

She suggests that keeping a note of how each volunteer is performing is crucial to transitioning. Some interviewees also talked about keeping records of each volunteer's performance. Volunteer managers consider keeping notes of the incidents that happened during each performance day. In conclusion, providing refreshing training, clarifying expectations, and making notes for volunteer performance are the approaches volunteer managers take to lead transitioning their volunteer in a better way.

Chapter 4: Discussion and Conclusion:

Four Stages of Transitioning Older Volunteers

An analysis of the transcripts revealed several important findings, which are illustrated in the transitioning model (Figure 1). The model is called the “four stages of transitioning older volunteers” and can be applied to any volunteering organization regardless of their different missions and purposes.

The first stage of transitioning is ‘planning for transitions,’ which means the transitioning process should be planned ahead of time. It can start at the beginning of volunteer recruitment and training. It is important to learn about the volunteers’ physical strengths, past experience, and family conditions, which can help the managers to plan for future transitions. The two most important actions to consider from the very beginning of planning are to set evaluation standards and to connect with the volunteers through daily conversation. Volunteer evaluation can assist the coordinator in knowing the performance of each volunteer. In addition, communication is essential in volunteer management. The volunteer manager should be open-minded and talk to the volunteers consistently. Frequent conversation enables the managers to know their older volunteers better. Good staff-volunteer relationships can bring them mutual trust and respect, and thus is believed to lead to better transitioning in the future. Moreover, planning for transitions ahead of time can also help the managers to identify the potential long-term, committed volunteers. Some older volunteers can perform really well and are worth investing in for higher positions or more difficult tasks in the organization.

The second stage of transitioning is identifying physical or mental decline or people who have negative attitudes towards volunteering. In circumstances involving physical and mental decline, the volunteer manager needs to determine whether the older volunteer only requires minor assistance or has to go through the transitioning process that leads to the third stage of transitioning. Evaluations and daily conversation can help the volunteer manager to learn more about the condition of the older volunteers. Light conversation or daily dialogues with the older volunteer can assist the manager in learning more about how to enable them to continue volunteering.

The third stage of transitioning is the stage when mutual decisions between the older volunteers and the volunteer managers are made in order to reach successful transitioning. A transitioning request can be raised either by the older volunteer or by the observation of the volunteer manager. If it is the older volunteer who asked for transitioning (either to continue in another position or to terminate volunteering), it is regarded as ‘self-initiated transition.’ On the other hand, when the volunteer manager has to come in and offer the older volunteer a transitioning request, it becomes a ‘guided transition.’ However, self-initiated transitions and guided transitions can be interchangeable with each other. The determining factor is the person who brings up transitioning.

In addition, during the third stage of transitioning, the volunteer manager can identify any need to clarify and arrange refresh training for the volunteers. Sometimes, re-clarifying objectives and the expectations of the organization can help volunteers to remember their

mission and act in accordance with the organization's goals. If clarifying and training cannot help the volunteer to perform better, it is time for the older volunteer and manager to discuss whether the volunteer should continue. If the older volunteer wants to continue, the volunteer manager can assist him or her by providing another position adjusted to the volunteer's physical or mental capability. For example, the older volunteer who cannot stand for a long time or climb stairs can volunteer in the ticket office, where he or she can sit. However, sometimes the older volunteers may lose the ability to make decisions for themselves, in cases of mental decline. The volunteer manager can seek assistance from the local area agency on aging, which has a variety of resources to assist the manager in making the right decision for transitioning the older volunteer. In conclusion, the transitioning stage requires the volunteer manager and the older volunteer to make the transitioning decision together.

The last stage is comprised by two alternative results after making a mutual decision on transitioning: to adjust to another position or to terminate volunteering. In this researcher's opinion, when older volunteers are referred to other positions and subsequently reach a certain point that their health condition prevents them from continuing, they need to go back to the third stage of transitioning and reopen transitioning discussions with the volunteer manager. This last stage of transitioning still needs consistent dialogue and conversation between the volunteer and the coordinator in order to be successful.

Summarizing the transitioning model, the researcher suggests that a good relationship is maintained between the volunteer managers and the older volunteers through continuous conversation. If communication with the older volunteers is well managed, positive emotions can be generated between the two entities, the organization and the volunteer. Better communication suggestions are found in the following section.

Better Communication Methods

Building a good relationship between the volunteer manager and the volunteers starts in the early period of volunteer recruitment. Communication between the theater staff and the older volunteers should begin with an understanding of their motivation for volunteering in the theater. During orientation and training, it is a good idea to let all volunteers know that being upfront about their health is important. A well-managed relationship creates an environment in which people trust one another. The older volunteers can feel secure volunteering in the theater when they know the staff and other volunteers are concerned about their safety and health. Therefore, the volunteers would support one another during volunteering and not shy away when emergency assistance is needed.

Having a good connection would also help the coordinator to be upfront about what they observed with the older volunteers. Rather than pointing out that the older volunteer can no longer do A or B, volunteer managers should suggest another position that requires his or her help and see if the older volunteer is willing to try. If a volunteer has failing mental health, and he or she has a partner or spouse who also is a volunteer in the same organization, transitioning both to another position together may be a good idea. After all,

maintaining good communication with the long-termed older volunteers can lead to a more peaceful transitioning experience.

Moreover, according to Bortree's (2012) work on effective communication between volunteers and staff, the organization should know their objective well, and then program the communication methods within the organization. Knowing the objectives of the theater allows the volunteer coordinator to design the volunteer management method according to the needs of the theater. The staff should relate the theater's objectives to the volunteers and make sure that all volunteers receive enough training before offering their services. Building connections and maintaining good relationships with committed, long-termed volunteers is important for continuing work that meets the objective of the theater. Moreover, when training is not needed to improve the volunteers' performance, determining whether the older volunteers are in need of other kinds of assistance by having normal conversations with them would decrease negative emotions while they volunteer.

Transitioning an older volunteer, whether to a higher or a lower-demand position, requires a face-to-face conversation with the older adult to make sure he or she agrees and wants to be transitioned. It is always important to have a mutual understanding between the volunteer managers and the volunteers in order to have a successful transitioning. For new theaters or theaters that have more middle-aged or younger older volunteers, transitioning can be planned ahead instead of when the real need occurs. On the other hand, if the volunteer managers are already experienced in managing older volunteers, it is always a good idea to know more about the individuals to maintain good interaction with the older volunteers.

Assistance from the Local Area Agency on Aging

Transitioning older volunteers not only requires mutual communication between the staff and the volunteer; sometimes it requires the knowledge of an expert on aging. Some study participants admitted to not understanding the situation of their older volunteers. Especially when it comes to mental declines, participants seemed unsure of how to start the transitioning conversation with the older volunteers. Asking about other coordinators' experiences on managing similar issues might provide solutions, but it is not always helpful. In this case, the volunteer coordinators could seek assistance from their local area agency on aging, which has a lot of experience working with older adults in the area. Experts on aging and disabilities may have information on how to provide assistance for the older volunteers in different circumstances.

One volunteer coordinator provided a very thoughtful suggestion: telling the newly recruited volunteers that aging is a normal process, and everyone should embrace the fact that we are all aging. It is impossible for both staff and volunteer to keep their roles forever, and it is best to accept when the time to step back has arrived. This idea could be integrated into the system so that the older volunteers understand that if they start to show signs of physical decline, they could always ask the coordinator to assist them in transitioning to other positions if they want to continue volunteering. Volunteer

coordinators should assist by evaluating the volunteers on their abilities when needed, trying not to force them to transition out.

Moreover, the local agencies on aging could also update theater volunteer managers with the latest information on policies or regulations for older volunteers. The latest policy changes on aging issues might affect how older adults are treated in different places, including volunteering in cultural organizations.

Research Limitations and Future Approach

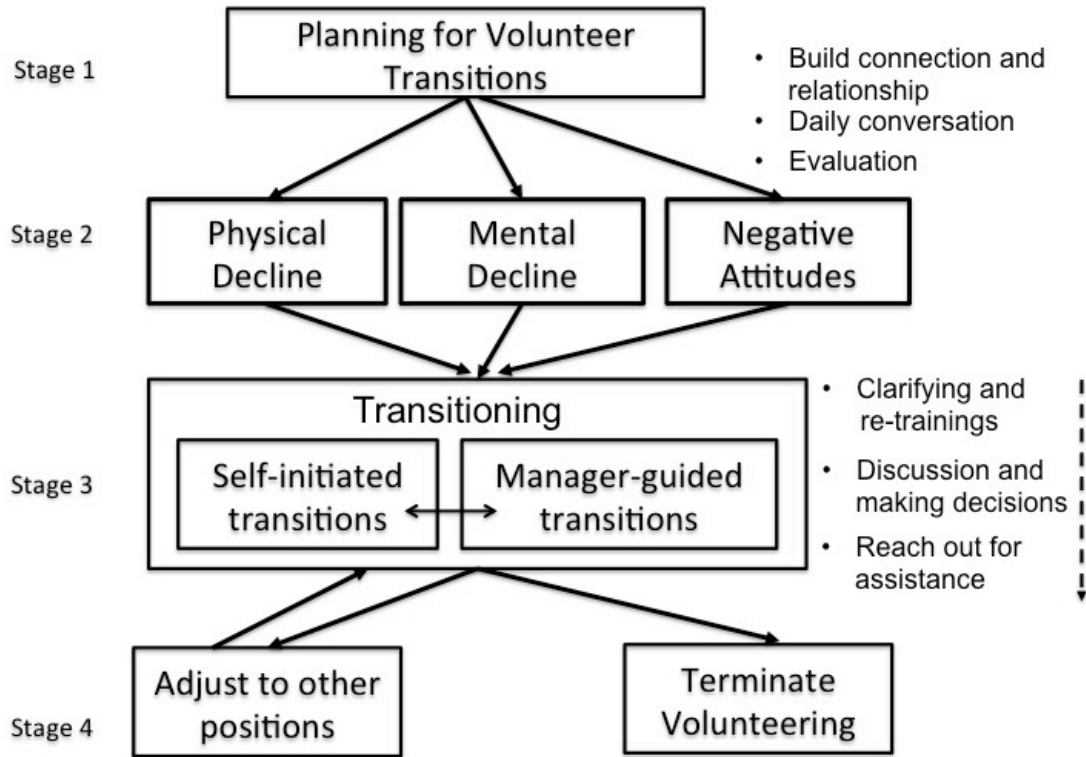
This study is an exploratory research that represents a preliminary study on volunteer transitioning. It might not sufficiently represent all theaters and performing arts centers in the United States, but could demonstrate certain issues on transitioning older volunteers. Because the design of the study explores how volunteer managers perceive transitioning older volunteers, it is better to have theaters and performing arts centers participate from all over the country. Therefore, conducting the study through telephone interviews was better in terms of research design.

In addition, the four stage transitioning older volunteer model is designed to apply to any organization that accepts volunteers. It can be applied to other cultural organizations that have been neglected in volunteering research, including museums, zoos, and libraries. The volunteer missions in these organizations are quite different from those of ushers and greeters in theaters, but these organizations also hold many older volunteers. For example, volunteers in the zoo sometimes need to be specially trained so that they could guide the tourists and educate them with knowledge of certain animals. It is said that though some older volunteers cannot walk, they still are devoted to the volunteer program, delivering knowledge to the public. Future research on transitioning older volunteers can refer to this model and examine whether it fits the transitioning process in other organizations.

This research did not explore the best practices on transitioning older volunteers. There are many non-profit organizations that may have other methods transitioning their older volunteers and have been successful. There is a need to further explore the best practices in transitioning older volunteers in theaters and cultural organizations in the United States. Some theaters and centers already have a complete system in place for transitioning older volunteers, but these were not recruited in this study. The experiences shared by these best-practice theaters could assist more theater coordinators in designing their own system and having better transitions.

Moreover, the population of older volunteers is still growing. Not only do volunteers in creative arts settings require transitioning; there is also a need to explore how other volunteer organizations examine transitioning their older volunteers. Future research could not only explore how managers approach transitioning, but also examine current older volunteers and older volunteers who have been transitioned out to find out what they think about the transitioning process and approach. It would be insightful to learn what older volunteers think about their volunteer experiences, and the information could extend this current study's findings to give a more complete picture of the transitioning process.

Figure 1: Four Stages of Transitioning Older Volunteers



Appendix 1

Research Questions:

- (1). What would you describe about your organization's philosophy on managing volunteers in general?
- (2). Tell me about your experiences working with the older volunteers in your theater?
- Is there any story of a good/bad volunteer who was in your theater you would like to share?
What happened?
- (3). Have you ever had to ask an older volunteer to stop volunteering? Can you tell me about that? What happened? Was there anything leading up to this, such as an incident you can recall?
-What kind of approach did you take? -What was your rationale for using this approach?
Can you tell me about how it worked? Would you do it this way again? What is your relationship after he/she stopped volunteering.
- (4). Think about an older volunteer who you helped to transition out of volunteering.
Could you tell me the story of what happened?
- (5). When do you think will be a right timing for the older volunteers to stop volunteering?
Why do you feel this way?
- (6). What do you think is the best way to tell an older volunteer to stop volunteering? Why?
- (7) Is there anything I haven't asked you that you feel is important for me to know about transitioning older volunteers?
- (8) What advice would you give other theater managers about transitioning volunteers out of their organizations?

Appendix 2

CODEBOOK:

Physical Declines:

1. **SITTING:** whether the volunteers are able to sit and watch shows during their volunteering time.
2. **PHYSICAL TRANSITION (in):** when interviewees talked about the physical decline of the older volunteers and the volunteer managers helping them transfer to another job in the theater that they can do within their health capacity.
3. **SELF-TRANSITION:** when older adults realized their health is declining and talked to the volunteer managers that they want to terminate their volunteering status. It also equates to when they said the older volunteers self-selected out of the theater. Having self-awareness of their health problems and understanding that it may cause threats to their own safety and the safety of others.
4. **REASONS OF TRANSITION:** when the managers talked about the conditions they would let their volunteers leave the theater or stop volunteering.

Mental Declines:

1. **VOLUNTEER SAFETY:** when volunteer managers talked about the safety of the volunteers, including driving at night or being afraid that the older volunteers might fall down because of the stairs in the theater.
2. **FRUSTRATION:** when volunteer managers talked about seeing the older volunteers having frustration when doing their volunteering job.
3. **DRIVING ISSUES:** when volunteer managers talked about because the older volunteers couldn't drive anymore and affected their willingness or ability to come and volunteer in the theater.
4. **REPEAT REMINDING:** when volunteer managers talked about volunteers who keep making the same mistake or need repeated reminders not to do the same wrong doings.
5. **DRESS CODE:** the uniform for all volunteers in the performing arts center. All volunteers should wear the same color, same style or particular kind of volunteering uniform. When volunteer managers talked about older volunteers cannot or do not want to follow the dress code in the theater.
6. **LIABILITY:** when volunteer managers talked about the liability of the volunteering jobs the older volunteers have done in the theater, including how effectively a volunteer worked.
7. **MEMORY ISSUES:** when volunteer managers talked about ushers who could not remember their missions or make sense of the seating rolls or seat numbers...
8. **MENTAL ISSUES:** when volunteer managers talked about how the older volunteers wandered and cannot stay focused.

9. VOLUNTEER SAFETY: when volunteer managers talked about the safety of the volunteers, including driving at night or being afraid that the older volunteers might fall down because of the stairs in the theater.
10. PATRON SAFETY: Clients, audiences, and donors are all considered as patrons in theaters. Due to patrons being the number one concern of a theater, their safety is important.

Attitude Issues:

1. ARGUMENT: when the ushers have an argument with the managers or patrons of the theater and cause damage between the relationships of these two sides.
2. ATTITUDE PROBLEM: when the volunteers have anger management problems. Some might be arguing with patrons or other customers.
3. DISREGARD DECLINES: when older volunteers who do not admit they have health issues that affect their volunteering performances or would put themselves, the patrons or other people at risk.
4. REGULATIONS (HANDBOOK): when volunteer managers talked about the rules, regulations of the theaters for the volunteers to follow.
5. AGAINST REGULATIONS: when volunteer managers talked about how sometimes older volunteers violated the rules or regulations caused by their behaviors or wrong doings. Some situations are against the rules because of the volunteer's memory or mental disabilities.
6. VOLUNTEER CHARACTERISTICS: when volunteer managers talked about the special personalities the volunteer managers hoped in their volunteers in the theater. For example, friendly, welcoming, knowledgeable, accessible...

Experiences of Transitioning:

1. EMIRITUS PROGRAM: retired volunteer recognition ceremony after serving for a long time. It is an existing program for appreciating the long-term volunteers in the theater. Sometimes, a certificate or award is provided to outstanding volunteers.
2. POSITIVE TRANSITION: when volunteer managers talked about the past, positive transition experiences. Sometimes include the older volunteers self-transitioning themselves due to their understanding their own health conditions.
3. TRANSFORMING KNOWLEDGE: when volunteer think the older volunteers could pass on their knowledge about one job to someone new; thus they could have reduced duty and decrease frustration.
4. FAMILY CONTACT: when older volunteers are incapable of continuing to volunteer and the volunteer manager contacted their family members or personal caregivers to discuss how to deal with the older volunteers.
5. APPRECIATION PARTY: when volunteer managers talk about setting up a volunteer appreciation party for retired or long-term volunteers in the theater.

6. APPRECIATION AWARDS: awards for the volunteers who had special dedication for the theaters.
7. LEVEL OF CONVERSATION: when volunteer managers talked about how it is easier or harder to tell a new volunteer versus a long-termed volunteer that they have to stop volunteering.
8. SCHEDULE: when volunteer managers describe some volunteers who they think cannot do the job anymore, and they schedule them less or do not schedule them for the next performance.
9. SELF-TRANSITION: when older adults realize their health is declining and talk to the volunteer managers about terminating their volunteering status. It also equals to when they said the older volunteers self-selected out of the theater. Having the self-awareness of their health problems and understand that it may cause threats to their own safety and the safety of others.
10. TIDY UP: help the older volunteers secretly, without telling them to redo, the managers helped to take over what has been left out. ex. like the newsletter in interview 1.

Transitioning Approach:

1. VOLUNTEER POWER: give the older volunteer options or power to decide where they want to volunteer according to their capability, interests or experiences.
2. VOLUNTEER PLACEMENT: when volunteer managers talked about placing the volunteers in the very beginning of volunteering in that theater.
3. RESPECT VOLUNTEERS: when volunteer managers talked about respecting the older volunteers in the theaters who might need a little care or just asking about how they are doing... a little more care.
4. CONVERSATION METHODS: when the volunteer managers talked about how to treat or how they talked to the older volunteers.
5. FAMILY ENVIRONMENT: when volunteer managers said they want to create the volunteering atmosphere family-like, building the atmosphere into a place that the volunteers could build friendships with each other. Or volunteers established friendships during their volunteering in the theaters that they might share rides or have other shared interests outside in other places.
6. ONE ON ONE CONVERSATION: when volunteer coordinators mentioned they would do face to face conversation with the older volunteers about their health conditions in the theater.
7. USHER RECORDS: when volunteer managers talked about keeping notes and records for the performances of the volunteers;
8. WITH OTHERS CONVERSATION: when the volunteer managers talked about talking to the older volunteers but involving the third person or other related people into the conversation about transitioning.

9. **EARLY SELECTION:** when talked about choosing the people to volunteer in the very beginning of new volunteer orientation time. It also includes when the managers talked about how it is important to select volunteer from the beginning.
10. **COMMITMENT:** when volunteer managers talked about older volunteers who are more committed comparing to volunteers in different age groups. Also when they said that the older volunteers have more time after retirement.
11. **FACE OF THE THEATER:** volunteers are the face of the theater, or talked about how volunteers have to look nice in order to represent the good image of the theater. It also includes when ushers cannot present a positive image for the theater and how it damaged their chance to continue volunteering.
12. **VOLUNTEER AWARDS:** Naming volunteer awards after certain previous model volunteers or outstanding volunteers.
13. **VALUABLE:** how the volunteer managers considered the older volunteers have brought their experiences or knowledge to the theaters. ex. OV provided huge services, save us lots of money...
14. **CONSTANT CONVERSATION:** when talked about continue having conversation with the volunteers or dialogue about transitioning with the volunteer her/himself.
15. **VOLUNTEER RESPONSIBILITY:** what the volunteers are required to do in the theaters.
16. **TRAININGS:** when the volunteer managers talked about training the volunteers in the theater before they could start serving as volunteers.
17. **TRANSITION MEANING:** explaining the meaning of transitioning older volunteers.
18. **TRANSITION TIMING:** when volunteer managers talked about what is the right timing for the older volunteers to transition. This includes volunteer managers say it has nothing to be with the time but with the capacity.
19. **PHONE CONVERSATION:** when volunteer managers prefer discussing the transitioning with the older volunteers through phone calls instead of face to face.
20. **SYSTEM:** when talking about setting up a system for managing the older volunteers in case of later discussions.
21. **MANAGEMENT PHILOSOPHY:** when the volunteer managers said what methods they have approaching managing the older volunteers in the theaters.

Other codes:

1. **DISCOUNTED TICKETS:** some theaters do not offer free tickets but discounted ones.
2. **FEELINGS:** when volunteer managers talked about whether they think volunteers' feelings are important or whether it matters to volunteer management or not.

3. FREE SHOWS: OV can see shows without payment as an exchange or as a reward to their volunteering.
4. MANAGERS' EXPECTATION: How the managers have the expectations on the older volunteers or how they talked about the importance of setting up expectations for their volunteers.
5. PARKING ISSUES: when the manager mentions parking as a problem for the volunteers.
6. PERSONALITY: when managers mentioning the personality of volunteers.
7. SHORT-TERM VOLUNTEER: people who only volunteer a short period of time and were terminated due to their capability, interest, and whether they could get along with other volunteers.
8. VOLUNTEER MOTIVATIONS: when volunteer managers talked about how they perceive the motives of the older volunteers who are volunteering in the theater.
9. AVOID BURNOUT: when volunteer managers are trying prevent their volunteers from burnout or too much stress with their volunteering jobs.
10. BUILDING USAGE: describing the different usage in the theater building. For example, whether there are elevators or only stairs in the theater.
11. MEMBERSHIP: when volunteer managers talked about being a member in the theater and its importance related to the volunteering culture of the particular theater.
12. VOLUNTEER PLACEMENT: when volunteer managers talked about placing the volunteers in the very beginning of volunteering in that theater.
13. THEATER AMBASSADOR: when volunteer managers talked about how older volunteers are like the ambassadors of the theater that they would share their rewards (tickets for shows) for their family and friends and potentially attract more people to volunteer for the theater.
14. SOCIAL OUTLET: when volunteer managers talked about volunteering in the theater as a social outlet, or a place to meet others, to make friends, or to have the opportunity to come out of the home.

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