Testing the Balance:

50/50 Management in a Volunteer Tutor Program

Maureen Sanders • Margaret Reine

Susan Devins • Grace Wiebe

Contents

Acknowledgments

How Did We Get Into This Anyway?

This is a question we asked ourselves often during the course of this project. It's a question that many people perhaps ask themselves when they get involved in projects that start out as small ideas and then grow into something bigger. Our answer to the question provides an overview of the context of community-based volunteer tutor programs in Alberta, of our own organization and of the why and what of our project.

Community-Based Literacy in Alberta

The field of adult literacy has developed considerably over the past twenty years in Alberta. One response to the need for literacy programming for adults has been the development of a network of community-based literacy programs across the province. There are about 85 such programs in existence today, assisting up to 3,000 adults each year. The majority of programs are supported by grants from Alberta Advanced Education & Career Development, and some receive monetary or in-kind support from businesses, foundations and service clubs in their communities. Others also receive time-specific funding for innovative projects from the National Literacy Secretariat.

> About 85 literacy programs assist up to 3,000 adults each year

Most Alberta literacy programs are staffed by volunteer tutors, with generally just one paid staff person to co-ordinate the myriad activities of the program. Several of the larger programs have two or more paid staff members. Most programs are sponsored by Community Adult Learning Councils, and some are housed in community colleges and libraries. Others are programs of larger organizations such as the John Howard Society or the YMCA. Increasingly, many programs are obtaining charitable status and are becoming independent organizations with governing boards.

> Literacy programs are staffed largely by volunteers with usually just one paid staff person in each group

Alberta Volunteer Tutor Projects: Participation Summary 1994			
	Students	**Tutors**	**Other**
Total Participants	2,985	2,443	1,154
Total Hours	95,362	96,446	24,100
Sex - Male	49%	16%	unknown
Sex - Female	51%	84%	unknown

The Prospects Program

Prospects Literacy Association was established as a community-based volunteer organization in 1980 and was the first volunteer tutor program in the province to be funded by the Government of Alberta. In 1991 Prospects became a registered society and a charitable organization. It has operated as an independent organization with a governing board since that time.

Our Funding
In 1995, core funding of $60,320 was received from Alberta Advanced Education and Career Development for our main tutoring program. An additional $11,781 was received for our Challenges program for people with developmental disabilities. These grants, along with any additional funds we raise, must cove all of our annual expenses including salaries, rent, utilities, insurance, library resources, office supplies, furniture, postage, printing, professional development, promotion, volunteer appreciation activities, and student support activities.

Our Members
In any year we have up to 200 students and 200 tutors in our tutoring program, usually between 80-100 pairs at any given time. As well as one-on-one tutoring, we also run small group workshops in reading, writing, spelling, math and family literacy. Most of these workshops are funded by Edmonton's Community Adult Learning Council. A further 75 to 100 students participate in these classes each year.

Our Projects and Staff
Over the past four years Prospects has undertaken a number of projects such as the development of a tutor training program in math, the piloting of evaluation tools, the development of family literacy programming, the creation of learning materials by and for students, and the development of customized computer database software. The funding for these projects has supplemented our core funding and has enabled us to support three permanent staff positions.

We have a full-time director, a full-time student co-ordinator and a part-time volunteer co-ordinator. Staff members are well qualified for the positions they hold: two have reading specialist qualifications, two have volunteer management qualifications and/ or expertise; all have qualifications and/or experience in adult education, including one-on-one and group teaching. Also, we

have four contract staff who teach group workshops, and several non-tutor volunteers who help out in the office and library.

Why We Did the Project

Over the last fifteen years in the province of Alberta, literacy co-ordinators have made considerable strides in improving literacy development opportunities for adults. They have accomplished this with basic levels of core funding, additional amounts of project funding and generous amounts of volunteer goodwill. However, core funding has shrunk significantly over the past few years while at the same time there is an increased demand for programs that are accessible, affordable, responsive and accountable. In order to meet these demands, co-ordinators need to find new ways of increasing the effectiveness of their programs and of making the most of the resources available to them.

We read about 50/50 Management in *Maintaining the Balance: A Guide to 50/50 Management* (DuPrey, 1992) published by the Literacy Volunteers of America. We found the concept useful and we began to use some of the ideas from the book in the Prospects' program. Soon, we realized that we were spending a lot of time discussing 50/50 and thinking about how we could continue to improve our program. We also began to see that other literacy programs would benefit from what we were learning. We applied for and received a grant from the National Literacy Secretariat in May 1994 to write up a case study of the 50/50 Management concept in practice. The case study was completed in June 1995 and is presented in this report.

What Is 50/50 Management?

The basic premise of 50/50 Management is that the key to effective volunteer management of literacy programs is maintaining a 50/50 balance between the "intake" and "support" focuses of a program (DuPrey, 1992). A 50/50 balance means that fifty per cent of the organization's energies and resources will be directed towards recruitment and training of volunteers and towards recruitment and assessment of students, while the other fifty per cent will be directed towards support and retention of existing tutors and students.

Prospects Tutors
· They give 10,000 - 12,000 hours a year to Prospects
· More than 85% are women
· 25% have teacher training
· A further 55% have college or university education
· 75% are employed

Funding has shrunk over the past few years while at the same time there is an increased demand for programs that are accessible, affordable, responsive and accountable.

The 50/50 Concept
50% = Intake
50% = Support

Finding this 50/50 balance helps to ensure that retention of participants will be increased, so that there will be less need to continually recruit and train or assess new people. The organization thus becomes more efficient and cost-effective. The 50/50 concept provides a framework for examining an organization's current situation and helping it to achieve this balance while continuing to operate the program.

How is the Concept Useful?

At the tutor/student level, for example, program staff might examine the extent to which their energies are spent on continually intaking and matching new pairs. If it seems that most of their efforts are being placed here (as often happens in volunteer programs), staff need to examine how a greater focus can be placed on supporting the matched pairs so that they stay in the program longer. This is important because retention of both students and volunteers is recognized as key to effective literacy programs (Mikulecky, 1993). A period of adjustment may be necessary to allow the 50/50 balance to be achieved, and regular monitoring will ensure that the balance is maintained. The result will be a program that is more effectively planned and managed and that will provide a high quality of service to students and tutors.

However, the 50/50 concept goes further. It can also be applied to the organizational structure of the program and to the leadership team (staff and board), and finally, to the financial underpinnings of the program. By applying the 50/50 concept to a board of directors, for example, an organization can ensure that the intake focus (analysing membership needs, selecting, preparing and nominating members) is balanced by the support focus (orientation, ongoing training and assessment of members' contributions).

Implications for Funding

Using the 50/50 concept, the organization can also analyse its operating costs as related to the intake and support focus objectives in order to develop fundable "packages." These packages—for example, the cost to create an initial match or to support a match for one year—can be used to make presentations for funds to

foundations, corporations and individual donors. Thus, once the organization has determined what it wants to accomplish it will have a means to seek out necessary funding to support the program.

The Limitations of Our Study

It was necessary to limit our study in a number of ways since the topic of volunteer management is a vast one. First we did not feel it was appropriate in this write-up to describe the 50/50 concept in the same amount of detail as it is described in *Maintaining the Balance* (DuPrey, 1992). Readers requiring further explanation of the 50/50 concept should look to the original source (see bibliography). The appendices in DuPrey's book also include a number of useful samples of forms, as well as staff, board and volunteer job descriptions, sample mission statements and budgets, and suggestions for publicity. We recommend this resource for anyone wishing to develop their own 50/50 Management Program.

Second, it was not our intention to write a report about ways and means of recruiting students and volunteers. Some aspects of recruitment are covered where it seems relevant to elaborate on the findings of our study, but we have tried to stay focused on the *results* of our efforts to implement a 50/50 style of management. We have also provided more information and suggestions in the area of supporting students and tutors. We knew that this was where our own program needed improvement and felt that this is probably the area of most interest to other programs. We recognize, however, that for some programs, particularly those in rural areas, recruitment of students, especially, is an ongoing concern.

Further ideas for effective management of volunteer programs can be found in several resources listed in the bibliography.

What Did We Do?

The Advisory Committee

We formed an advisory committee to the project consisting of the three Prospects staff, Maureen Sanders, Margaret Reine and Susan Devins, as well as co-ordinators from three other literacy programs: Terry Regimbald from STAR Literacy Program in St. Albert, Sandra Dye from A.L.P.H.A. project in Wildwood and Carol Ulmer from Drayton Valley Adult Literacy Society. Ken MacDonald, Chair of the Prospects Board from 1993-1995 was also A member of this committee.

The committee met three times to provide feedback during the course of the project, to serve as a sounding board throughout the project and to evaluate the achievement of the objectives. Committee members also responded to drafts of this report. It was particularly important to obtain the perspectives of co-ordinators in small, rural programs where the realities of running a program can differ substantially from the realities of a large urban program. We wanted to ensure that any findings from our study would be applicable to programs of all kinds across the province.

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Collecting Data

We decided to gather, in three ways, the data needed to help us determine the effectiveness of our program. First, we would track where we spent our time over a period of several months. This would demonstrate whether or not we were balanced in our approach to program management

Second, we would do a comparison over time of our year-end Program Participation Summaries compiled for our provincial government funder. Since we had been making conscious efforts in the area of 50/50 Management for more than a year, we felt that looking at statistics for year-end 1992 and 1993 along with the coming 1994 year-end figures might provide a reasonable picture of our progress towards our goal of a more effective program.

Third, we wanted to do some analysis of the Board of Directors

> To collect data we would:
> · track our time over a 4 month period
> · compare participation summaries over 3 years
> · do analysis of board of directors

since, as DuPrey points out, they are an integral part of a 50/50 organization. Our data collection in this area consisted of reflection on how the Prospects Board has developed over the last few years and of where it might develop further.

Tracking Time

In order to better develop a 50/50 Management style we decided to track how we spent our time over a period of several months. We would then be able to see whether we were taking a balanced approach to program management. If we were not, we could determine how we would be able to move towards a more balanced division of volunteer management of our resources. We were also interested in tracking a number of other factors, including the ratio of paid time to volunteer time and the amount of time spent on project work versus core work. It should be noted that this tracking of time occurred after we had already been working at the development of 50/50 Management for almost a year.

People Involved in the Tracking

Tracking of time was carried out by the three paid staff members at Prospects: the Executive Director (full time), the Student Co-ordinator (full time), and the Volunteer Co-ordinator (part time) and by the Chair of the Board of Directors, on behalf of all Board members. The hours of temporary staff and volunteer office and library staff were tracked by the Volunteer Co-ordinator. While each staff member has specific job duties there is also considerable overlap in the roles of program staff. For example, all permanent staff are involved in tutor training, direct program course delivery, tutor/student consultation, library work, and some degree of administrative work.

How We Tracked Time

Time tracking was based on a 7.5 hour work day. It was agreed that all staff would chart in fifteen minute increments. The tracking was to be charted every working day for a period of four months. We felt that the four month spread would represent fairly well the differences in various organizational activities which are cyclical in nature such as tutor training, fund-raising, student assessments, direct program delivery and board tasks.

Initially, tasks were divided into those falling under "intake"

or "support." Intake dealt with aspects such as recruitment, orientation, training, assessment, and matching. The support aspect focused on resources and measures used to maintain the program, such as volunteer and student recognition, in-services, consultation about tutoring or resource materials, newsletters, student re-assessments, and support groups for tutors and students. We used the tasks delineated by DuPrey (1992), and adapted them to fit our own context (see figure 1).

Figure 1
Elements of Intake and Support*

Intake Focus	*Support Focus*
Recruitment	Ongoing training
Interview/Assessment	Newsletter
Orientation	Resource library
Training	Travel (rural program)
Matching	Consultation
Data entry	Reassessment
	Telephone contact
	Networking/student referral
	Group workshops
	Student group
*Adapted from DuPrey, 1992	

We felt we also needed to examine the intake and support focuses in terms of the overall administration of the program.

Figure 2
Administrative Intake and Support Tasks

Intake Focus	*Support Focus*
Advocacy	Budget setting
Professional leadership	Book-keeping
Grant proposals	Office maintenance
	Curriculum development
	Program development
	Conferences
	Networking/meetings
	Special fund-raising

We placed under intake those tasks deemed to be "getting things started," and placed under support those tasks deemed to be "keeping things moving along." Thus we included elements such as advocacy work, grant proposal writing, budget setting and book-keeping, and curriculum development in these categories (see figure 2).

Finally, we also tracked staff time spent on Board Intake and Support (see figure 3) and on Fund-raising activities (see figure 4).

Figure 3
Intake and Support Tasks for Board of Directors

Intake Focus	*Support Focus*
Job descriptions	Meetings
Membership analysis	Minutes
Selection, preparation & nomination	Appraisals
	Orientation
	Training
	Assessment
	Consultation

We decided to set up the tracking sheet in grid format, to enable each staff member to chart daily numerical totals easily. Each time-sheet represented a week at a glance. Tally sheets were used to total all staff hours. (See Appendix A for samples.)

Revisions to Time-Tracking Sheets

The tracking system evolved over time and usage. We revised the sheets several times as we refined and streamlined our data collection. In total, three versions of tracking sheets were drawn up, used for a few weeks, and then revised. Suggestions and comments for changes to the time-tracking sheets also came from members of the Advisory Committee. The Chair of Prospects Board, for example, provided samples of time-tracking sheets and definitions for categories used in his own job, which helped us to simplify our sheets.

The main changes made to the time-tracking sheets were as follows

1. An additional column was added to track paid hours and staff volunteer hours, since a considerable portion of work is done outside of paid work hours.
2. Time devoted to the core one-on-one tutoring program and to projects of the program were separated out. Since it was our intention mainly to examine the 50/50 concept in relation to the volunteer tutoring program, it was necessary to obtain a realistic estimate of the time needed to run this program. This would also ensure the project's applicability to other tutoring programs in the province because the majority focus only on volunteer tutoring.

Figure 4
Fund-raising Tasks
· Letter writing
· Direct mail
· Grant proposals
· Casino work
· Special events
· Community presentations
· Letters of thanks
· Committee meetings
· PR committee time
· Media time
· Sales of materials

3. Eventually, we collapsed detailed categories, which were rather unwieldy, into broader categories, and we developed a definitions page to help us to continue tracking tasks in a consistent way (see Appendix A).

4. There are a number of non-tutor volunteers working at Prospects, including board members, library volunteers and office volunteers. Special categories were set up to account for these hours since we would be grossly overestimating the capacity of the paid staff if we did not take into account the additional work done by these volunteers.

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The Value of This Exercise

In a program as busy as ours, where there is never enough time to do everything that needs to be done, it seemed pointless at times to try to keep track of our time. The early drafts of time- sheets were particularly frustrating as they were overly detailed and complex. Sometimes, too, we would forget about this additional task and would have to spend even more time thinking back over several hours.

Over the weeks it was gratifying to see an image of our program emerge that we were not accustomed to seeing. We saw the services we provide quantified in greater detail than we had ever seen them before

Over the weeks, however, it was gratifying to see an image of our program emerge that we were not accustomed to seeing. We were affirmed in our belief that we were indeed on the right track in terms of providing the necessary support to our tutors and students. We also began to note the considerable amount of non-volunteer time being given to our program. And we began to tally, for the first time, the number of volunteer hours that paid staff were contributing to the program. But it was not until we compiled and analysed the data at the end of four months, that we saw the services we provide quantified in greater detail than we had ever seen them before.

Comparing Year-end Participation Summaries

Gathering the data for the second phase was relatively simple. We have on file at Prospects copies of all year-end reports submitted in previous years. Once we had completed our analysis for the 1994 statistics we were able to compile the data for three years onto one chart where we could easily compare across years.

The Board of Directors

DuPrey describes the two purposes of a board of directors as being
a) to provide the human, fiscal and community resources required to achieve a balanced intake and support for tutors and students.
b) to provide the expertise and guidance needed to conduct the organization's affairs.

In order to get and keep the high quality board members needed to achieve these purposes, Duprey suggests that the 50/50 System should be applied to a board of directors. Thus, as seen in figure 5, we needed to consider all of the elements related to the bringing in and supporting of board members.

Figure 5	
Elements of Intake and Support for a Board of Directors	
Intake Focus	*Support Focus*
Membership analysis Selection, Preparation and Nomination	Orientation Ongoing training Assessment

The role of staff, whether paid or volunteer, is to implement the program. The precise role of paid staff members will depend on the stage of growth of the organization (see DuPrey, 1992 for a description of the stages of growth). In Alberta, the majority of literacy programs have at least one paid staff person, with an advisory committee to provide advice and often hands-on support.

As programs grow, take on more staff and become board-governed, the roles of board and staff may change. The board will be less involved in day-to-day operations and more involved in setting policy, providing vision and direction, and ensuring that the resources needed to achieve the vision are in place. The prime staff person will be responsible for managing the program, delegating much of the work to staff either paid or volunteer.

As programs grow, take on more staff and become board - governed, the roles of board and staff may change

As part of our data collection, then, we also reflected on the Intake and Support focuses in relation to the Board of Directors of our organization.

The results of all of these forms of data collection is detailed in the next section.

Where We Spent Our Time

At the end of four months we had collected a substantial amount of data. We each totalled the number of hours we spent working in the various categories and then found the totals for the four month time period. We also totalled the number of volunteer hours that staff had worked during this time, as well as the total number of volunteer hours worked by board members and office or library volunteers. In keeping with the volunteer nature of this project, we were fortunate to obtain the help of Dr. Grace Wiebe in analysing the data. Grace, who is a visiting Assistant Professor in the Department of Linguistics at the University of Alberta, converted all of the numbers to percentages to provide a picture of what was happening in the program. She also provided the tables and graphs that or. "art of this report

The most instructive pieces of information related to:

- The hours spent on the intake and support focuses of the core volunteer tutor program i.e. project work not included (Table 1).
- The paid and volunteer administrative hours worked over a four month period i.e. does not include tutoring hours (Table 2).
- The total paid and volunteer hours (including tutoring) worked over a four month period (Table 3).
- The breakdown of administrative hours spent on core work, project work and fund-raising work (Table 4).

> It seemed we were spending slightly more time in the support area--at almost 52%, as compared with 48% in the intake area

Details of the data follow in the form of four tables with accompanying explanation. Interpretation of the results follows in the section entitled 'What Does It Mean?"

Paid and Volunteer Hours Spent on Intake and Support

It was reassuring to see that we were close to being in balance in the amount of time devoted to these two areas. In fact, it seemed we were spending slightly more time in the support area—at almost 52% as compared with 48% in the intake area. This was not really a surprise since we had been making extra efforts to spend more time supporting our tutors and students. So we were pleased to confirm that this was happening.

Table 1

Core Volunteer Program*

Personnel	Intake Hours		Support Hours		Total Hours	
Paid Staff	40%	(471)	60%	(697)	74%	(1168)
Office/Library Volunteers	78%	(220)	22%	(62)	18%	(282)
Board Members	55%	(65)	45%	(53)	8%	(118)
Totals	48%	(756)	52%	(812)	100%	(1568)

* NOTE: In this and all subsequent tables:
% Percentages are rounded to the nearest whole number
( ) Numbers in brackets indicate hours

Core Volunteer Program
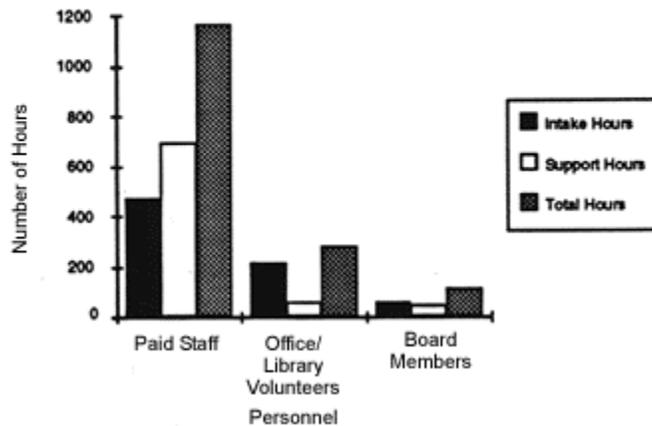
What was surprising to us was the extent to which paid staff time was heavily weighted in the support area, with 60% of our time spent here. We had been able to compensate for this imbalance through the contributions of volunteer board members and office and library volunteers. The office and library volunteers were particularly helpful since they were able to do such practical tasks as providing basic information about our program to new tutor and student enquiries, filling in basic information sheets, processing new books for the library and so on.

This freed up paid staff time to spend on tasks that required more expertise such as helping tutors with strategies for teaching, re-assessing students, advising students about other upgrading programs and providing in-service training to tutors.

Paid and Volunteer Administrative Hours Over a Four Month Period

The potential number of paid work hours in the four month period in which we tracked time was 1,612. This included two permanent full-time staff members each with 570 paid hours, a permanent part-time staff member with 330 hours, and a temporary part-time receptionist with 142 hours.

Table Two			
Total Administrative Hours			
			% of Total Hours
			Spent as
Personnel	**Total Hours**	**Volunteer**	**Hours**
Paid Staff	1989	19%	(377)
Office/Library Volunteers	340	100%	(340)
Board Members	195	100%	(195)
Totals	**2524**	**36%**	**(912)**

Administrative Volunteer Hours
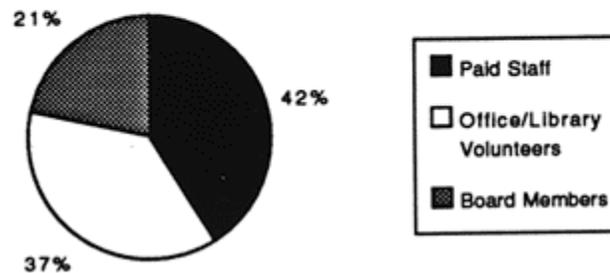
As seen in Table 2, the actual number of hours that paid staff worked during this period was 1,989. Thus, one interesting finding was that paid staff gave a further 19% of their time, on average, as volunteer hours to the program. There was considerable variation between individual staff members in their contribution of volunteer hours, the smallest contribution being 5% and the largest being 38%. While Prospects has a personnel policy that staff takes time off in lieu of overtime worked, in fact much of the overtime worked is not claimed and becomes a contribution of volunteer time to the program. Our sense is that this is true of many other literacy

programs in the province. The reality is that there is always more work to do than there is staff time to do it.

Also, as seen in Table 2, volunteer hours accounted for a further 912 hours given to the overall administration of the program. When we include these volunteer hours worked by board members and office and library volunteers, the total number of administrative hours worked in the program during this four month period was 2,524. In other words, slightly more than 36% of the administrative hours worked in the program were volunteer hours.

Total Paid and Volunteer Hours Worked Over a Four Month Period

Taking Table 2 one step further we added volunteer tutoring hours to the administrative hours worked in the same four month period. This gave us the totals displayed in Table 3.

Table Three			
Total Volunteer Hours			
			% of Total Hours
			Spent as
Personnel	**Total Hours**	**Volunteer**	**Hours**
Paid Staff	1989	19%	(377)
Office/Library Volunteers	340	100%	(340)
Board Members	195	100%	(195)
Tutor Volunteers	3240	100%	(3240)
Totals	**5764**	**72%**	**(4125)**

Total Volunteer Hours Over a 4 Month Period
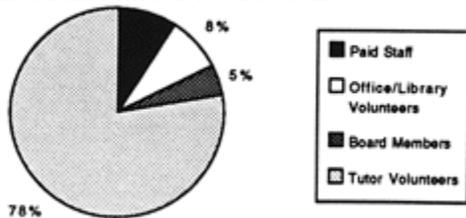
Ratio of Paid Hours to Volunteer Hours
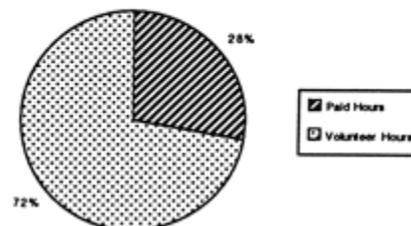
The most significant figure in this table is the percentage in the bottom middle column. A full 72% of the hours worked in the program were volunteer hours. Or to put this another way, almost three of every four hours worked in the program were volunteer hours; only about one in four were paid hours.

Administrative Hours Spent on Core Work, Project Work and Fund-Raising

Finally, as stated earlier, we felt it was important to separate out the data relating to the hours that were spent on project work versus the core work of the program—the volunteer tutoring program. Table 4 shows this breakdown of data.

Table Four

Administrative Hours Spent on Core Work, Project Work and Fund-Raising

Personnel	Core		Project		Fund-Raising		Total	
Paid Staff	59%	(1168)	23%	(496)	18%	(352)	79%	(1989)
Office/Library Volunteers	83%	(282)	17%	(58)	--	--	13%	(340)
Board Members	60%	(118)	19%	(37)	21%	(40)	8%	(195)
Totals	62%	(1568)	2%	(564)	16%	(392)	100%	(2524)

Administrative Hours Over a 4 Month Period
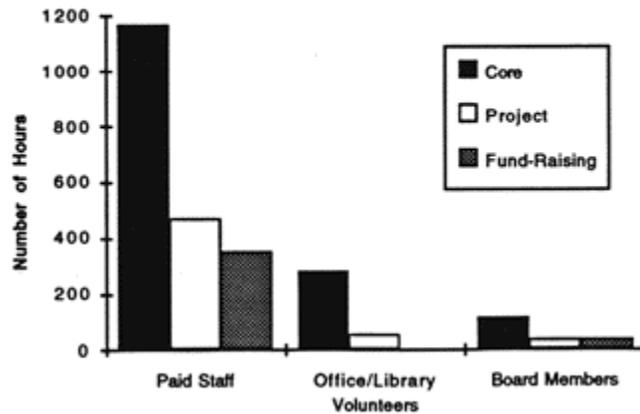
We determined that about 59% of staff time (including staff volunteer time) was spent on core program work during this four month period, 23% was spent on project work, and 18% was spent on fund-raising activities. When all work hours were totaled (including those contributed by board and office/library volunteers) we found that 62% of time was spent on core work, 22% on project work and 16% on fund-raising work.

Comparison of Year-end Statistics

We first began thinking about the concept of 50/50 Management in the spring of 1993, although we did not apply for the project grant until the spring of 1994. However, we felt that we had been applying the 50/50 principles over a long enough period to be able to make some evaluation about whether it was having any effect on our program. Thus we used our 1992, 1993 and 1994 statistics to compare such things as retention rate for students and tutors, the percentages of students and tutors who remained active at the end of any given year, and the numbers of students and tutors classified as inactive. The three year comparisons are shown in Tables 5 and 6.

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Student Participation

Table 5 presents a picture of the status of all students who had participated in the program over three consecutive years. In each year we show students who are either new in that year or are returning from the previous year. Within these two broad categories we then show students who are still *active,* those who are *inactive* or on hold temporarily, those who have *withdrawn* from the program and those whom we consider to have *completed* the program. Completers are considered to be those who have completed their goals in the program to their own satisfaction. They may or may not have moved on to other programs such as academic upgrading.

The raw numbers in each of the categories have been converted to percentages of the total number of students enrolled

Table Five

Year-End Participation Summaries 1992-1994
Students

		Active		Inactive		Withdrawn		Completed		Total	
1992	New	60%	(59)	18%	(18)	15%	(15)	6%	(6)	47%	(98)
	Ret.	39%	(43)	24%	(27)	22%	(24)	15%	(17)	53%	(111)
	Total	49%	(102)	22%	(45)	19%	(39)	11%	(22)	100%	(209)
1993	New	54%	(43)	16%	(13)	20%	(16)	10%	(8)	35%	(80)
	Ret.	48%	(73)	21%	(31)	18%	(26)	12%	(18)	65%	(148)
	Total	51%	(116)	19%	(44)	18%	(42)	11%	(26)	100%	(228)
1994	New	72%	(43)	3%	(2)	22%	(13)	3%	(2)	35%	(60)
	Ret.	64%	(70)	8%	(9)	22%	(24)	6%	(7)	65%	(110)
	Total	66%	(113)	6%	(11)	22%	(37)	5%	(9)	100%	(170)

New and Retained Students Over a 3 Year Period
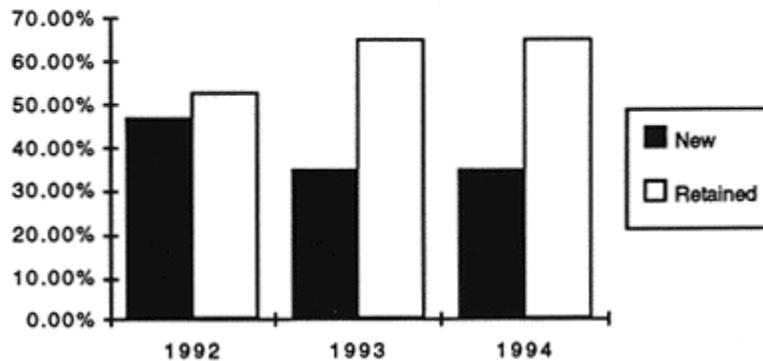
In terms of overall numbers, there is some variation over three years. In 1992, 209 students were enrolled in the program, in 1993, 228 students enrolled and in 1994, 170 students were in the program. The drop in numbers between 1993 and 1994 is attributable in large part to a decision made by staff to intake fewer new people in 1994 in order to put more of our efforts into the support focus of our program. Thus, for example, we brought fewer new students into the program, but we focused on initiatives such as a student support group and the development of additional learning opportunities for students during this year.

In comparing the new and returned categories over three years an obvious fact emerges. In 1992, almost half (47%) of the students in the program at the end of the year were new that year, while only 53% of continuing students had returned from the previous year. At the end of 1993 and again in 1994, only 35% of the students were new, while 65% had returned from the previous year. We seemed, then, to be achieving more success in retaining a greater percentage of the total students over this two year period.

In comparing the active/inactive categories a distinct trend emerges. By the end of 1994 a far higher percentage of both the new and resumed students are active. In fact only 6% of the total are inactive at the end of the year as compared with 19% in 1993 and 22% in 1992. We attribute this to our increased efforts to keep in touch with students and not allow them to languish on "hold" status for too long. After 6 months to one year we encourage them either to return to the program or to withdraw until they determine what they really want to do.

By the end of 1994 a far higher percentage of both the new and returned students are active

The numbers and percentages of withdrawn students stayed relatively constant over two years and increased by almost 4% in 1994. The students categorized as completed on the other hand fell from the 11-12% range in 1992-1993 to 5% in 1994.

Figure 6
Supporting Students

- Providing a match as soon as possible after assessment
- Follow-up consultation soon after a match to ensure it's working
- A quick re-match when matches break up
- Always keeping the door open for another chance when students seem to lack follow-through or consistency in attendance
- Regular telephone contact (every one to two months)
- Being available in the office to talk about strategies
- Providing help in using the library e.g. recommending resources
- Allowing time for social talk when they are in the centre for tutoring or when they drop in to use the library
- Providing referrals to other agencies for help with various problems
- Providing extra help and support to get them through the tough times when they feel they're not making progress and are ready to quit
- A support group run by students for students, with staff assistance
- Regular re-assessment to provide feedback on progress (at least once a year)
- Small group work where possible for waiting students or those requesting more tutoring time
- Providing volunteer opportunities to enable students to "give back. to the program
- Recognition of their learning and achievements

Tutor Participation

Table 6 presents a picture of the status of all tutors who had participated in the program over three consecutive years. In each year we show tutors who are either new in that year or are returning from the previous year. Within these two broad categories we then show tutors who are still *active,* those who are *inactive* or on hold temporarily, and those who have *withdrawn* from the program.

Table Six

Year-End Participation Summaries 1992-1994
Tutors

		Active		Inactive		Withdrawn		Total	
1992	New	71%	(59)	20%	(17)	8%	(7)	**44%**	**(83)**
	Ret.	54%	(58)	22%	(24)	23%	(25)	**56%**	**(107)**
	Total	62%	(117)	22%	(41)	17%	(32)	**100%**	**(190)**
1993	New	65%	(46)	18%	(13)	17%	(12)	**36%**	**(71)**
	Ret.	48%	(60)	20%	(25)	32%	(40)	**64%**	**(125)**
	Total	54%	(106)	19%	(38)	27%	(52)	**100%**	**(196)**
1994	New	85%	(34)	8%	(3)	8%	(3)	**27%**	**(40)**
	Ret.	62%	(67)	10%	(11)	28%	(30)	**73%**	**(108)**
	Total	68%	(101)	9%	(33)	22%	(33)	**100%**	**(148)**

The raw numbers in each of the categories have been converted to percentages of the total number of tutors enrolled in the program each year.

Again, in terms of overall numbers, there is some variation over three years. In 1992, 190 tutors were enrolled in the program, in 1993, 196 enrolled, and in 1994, 148 tutors were in the program. As with the student numbers, the drop in tutor numbers between 1993 and 1994 is attributable to the decision made by staff to intake fewer new people in 1994 in order to put more of our efforts into the support focus of our program. Thus, for example, we did fewer new tutor training workshops and spent more energy on revising our tutor training workshops and adding more in-service training opportunities for tutors already in the program.

New and Retained Tutors Over a 3 Year Period
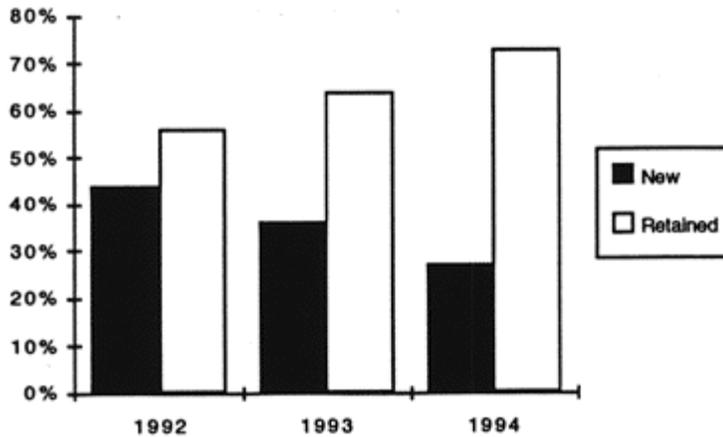
As with the student numbers there was also a significant increase in the percentage of continuing tutors by the end of 1994. In 1992, 44% of the tutors in the program at the end of the year were new that year, while only 56% of continuing tutors had returned from the previous year. At the end of 1993, 64% of the tutors had returned from the previous year and by the end of 1994, 73% of the tutors had continued from previous years. Thus we were even more successful in retaining a greater percentage of the total tutors (as compared with students) over this two year period.

In comparing the active/inactive categories a similar trend emerges as we saw in the student statistics. By the end of 1994 a higher percentage of both the new and returned tutors are active. In fact only 9% of the total are inactive at the end of the year as compared with 19% in 1993 and 22% in 1992. We attribute this to our increased efforts to support tutors in their work so that they do not become discouraged and opt too readily for what we termed the "grey zone"—hold status. Also, we made sure that all tutors on "hold" status were contacted regularly to obtain a new tutoring commitment or to close their files. The percentages of withdrawn tutors also decreased somewhat between 1993 and 1994, particularly those in the "new" category.

> We were even more successful in retaining a greater percentage of the total tutors (as compared with students) over this two year period

Figure 7
Supporting Tutors

- One-on-one help after tutor training for those who need extra help
- Follow-up consultation soon after a match to ensure it's working
- A quick re-match when matches break up
- Regular telephone contact to provide advice/assistance (every one to two months)
- Being available in the office to talk about strategies
- Providing help in using the library e.g. recommending resources
- Allowing time for social talk when they are in the centre for tutoring or when they drop in to use the library
- Offering alternative volunteer work in the organization if tutoring is not suitable for them
- Consistent follow-up for tutors on hold
- Showing appreciation for their contributions (see Volunteer Recognition Activities in Participation Summaries)
- Providing additional volunteer opportunities for those who seek them e.g. small group tutoring helping in tutor training, board or committee work etc.

50/50 and the Board of Directors

We were fortunate that our Chair from 1993-1995 had considerable experience in board development having volunteered for several years as a board trainer with he Volunteer Centre of Edmonton

At the time this project began, Prospects status as a charitable organization was still only a little more than two years old, and the small six-member Board was still finding its feet. We were fortunate that Ken MacDonald, our Chair from 1993-1995, had considerable experience in board development, having volunteered for several years as a board trainer with the Volunteer Centre of Edmonton. Ken thus brought a wealth of theoretical knowledge to his new position as Chair. But he was also prepared to invest the time needed to put his knowledge into practice and to do this within the context of the 50/50 project.

Intake Focus

One of Ken's first tasks was to review the organization bylaws with a view to revising them. This was subsequently done by a board member with legal expertise, in consultation with other board members and staff. The new bylaws were approved at the 1994 Annual General Meeting and are now undergoing further revisions in order to put them into plain language.

> We wanted to be able to share the workload and to recruit people with a range of expertise

As part of this revision process, it was also decided that we should increase the number of people who could be elected to the Board. We wanted to be able to share the workload and to recruit people with a range of expertise. We decided to increase the size of the board to a maximum of ten members and to include both tutor and student representatives.

Membership Analysis

During Ken's tenure as Chair, a recruitment committee was formed to analyse the needs of the Board in terms of the various functions of the Board. From its inception, the legal and financial responsibilities of the organization have been met by ensuring that the board members included both a lawyer and an accountant. Past members have also included people with an interest in the areas of personnel and fund-raising.

Selection, Preparation & Nomination

In the most recent membership analysis process we decided to recruit two students to the new Board so that student interests and concerns could be more readily heard. Since fund-raising is integral to the purposes of a Board, the committee also sought to recruit more people with fund-raising and public relations experience. As well they determined to look for at least one person with a more detailed knowledge of and interest in our programs. Potential nominees were interviewed by the nominations committee and were provided with written job descriptions (see Appendix 8) and general information about the program. Appropriate candidates were then recommended to the membership for election to the Board.

Over the past two years we have had a Board with a well balanced range of members. Now, with ten members, there is broad representation from the community as well as from the Association

Over the past two years we have had a Board with a well balanced range of members. Now, with ten members, there is broad representation from the community as well as from the Association

Support Focus

Orientation

New board members first receive an orientation package. This package contains: Minutes of the past several meetings, Association financial reports and bylaws, an overview of current projects, and articles about the roles and duties of board members. New members also receive an orientation to the organization, by Staff and Chair, at a meeting held before the first board meeting.

Ongoing Training

We have been less consistent about providing ongoing training to board members. However, at various times we have provided a one-day board development meeting, distributed articles about board operations, and had various staff members

attend board meetings to speak about their roles. Also, we always have an annual planning day which is attended by all staff and board members. This provides an opportunity for new board members in particular to gain an in-depth understanding of the workings of the organization, to participate in reviewing the past year's work, and to help establish new goals for the coming year.

Assessment

The support element we have been least successful in implementing has been that of assessment of board members. However, we have recently written a set of policies for volunteers which is being revised to include policies for board members. Once this has been done, the Board will feel more confident in assessing the contributions of its members, both as a collective and as individuals, on a regular basis.

What Does It Mean?

Time Tracking

1) Testing the Balance

Our efforts to find an appropriate balance between the intake and support focuses were successful. At this point in the development of our program, our staff time was weighted quite heavily in favour of the support focus. However, the additional help of volunteers in the intake area helped us achieve a good balance overall.

2) Paid Staff and Volunteer Time

A second finding was that paid staff gave a further 19% of their time, on average, as volunteer hours to the program. This is slightly more than the total amount of time staff spent on fund-raising activities (18%). It is also a little less than the total time spent on special projects of the program (23%).

> Paid staff gave a further 19% of their time, on average, as volunteer hours to the program

One way to view this volunteer time given by staff is to suggest that staff contributed time to enable the program to grow and develop. Prospects has gone through a period of substantial growth during the last few years and staff have been willing to support this growth by their contribution of hours well beyond paid hours. It is largely through taking on special projects that the organization has been able to support the salaries of three permanent staff and several contract staff. At the same time, it is through these projects that we have diversified learning opportunities for students and tutors, have produced creative and innovative programs and materials, and have improved the overall administration and functioning of the organization.

> Much of the success for ensuring Prospects financial stability can be attributed to the many hours of volunteer work given by staff

Prospects has gradually become established in its new board-governed status over the past four years and the Board is slowly taking on more responsibility for fund-raising. But in the short term, much of the success for ensuring its financial stability can be attributed to the many hours of volunteer work given by staff.

3) Use of Volunteers in Administration

A smaller but also important finding was the number of additional volunteer hours given to the administration of the

program. While literacy programs traditionally use volunteers in the capacity of tutors, programs are also increasingly using volunteers in other areas of the program. We were surprised to see that 36% of the administrative hours worked in the program were volunteer hours. Using volunteers in this capacity enabled paid staff to spend more time developing our abilities to adequately support students and tutors in their work together.

4) Dollar Value of Volunteer Hours

A fourth significant finding was the ratio of volunteer hours to paid hours worked in the program. In these times when we are called upon to be accountable for the tax dollars given to the program, it is extremely important to be able to point to the cost effectiveness of the program. With almost three volunteer hours donated for every paid hour worked, this is one way we are able to demonstrate excellent returns for government funding.

> With almost three volunteer hours donated for every paid hour worked, we are able to demonstrate excellent returns for government funding

We can also convert these volunteer hours to a dollar value. One way to do this is to use the calculation method recommended by David Ross (1994). He suggests taking the number of volunteer hours in your program and multiplying it by the average hourly wage in community, business and personal services in the province. Therefore in 1994 when an estimated l2,000 volunteer hours were contributed to our program we can place a value of $177,120 on this time (see box at the left). In dollar terms then, volunteers are providing almost two and a half times as much to the program as the government provides.

> Dollar value of volunteer labour
> Volunteer hours * average hrly wage in Alberta in given year
> Thus in 1993:
> 12,000 hrs * $14.76 = $177,120
> $177,120 in-kind hours donated to the program

5) Fund-raising Hours

A fifth finding was that 16% of overall program time (excluding tutoring hours) was spent on fund-raising activities. We felt that this was too high a percentage, especially for paid staff who actually spent 18% of their time in this area. Yet the finding reflects the fiscal realities of not-for-profit organizations in these difficult economic times. Nevertheless, our goal is to reduce the amount of paid staff time spent in this area over the next year. As the board gradually assumes more responsibility for securing the necessary funds to fully support our programs, we hope to reduce to 10% or less the amount of their time that paid staff spend on fund-raising activities.

> In dollar terms, volunteers are providing almost two and a half times as much to the program as the government provides

Participation Summaries

1) Student Retention Rates and Optimal Numbers
We were encouraged by the general trends we observed in our analysis of these three years of record keeping.

One of our main goals in implementing a 50/50 Management style was to increase the retention rate in our program and there was certainly evidence of this happening. In order for it to happen, however, there needed to be an adjustment in overall numbers. We could not continue to intake large numbers of students and tutors each year and expect to be able to give them the quality of support necessary to keep them in the program.

2) Inactive Tutors and Students
Our efforts to stay in touch more consistently with matched pairs and to ensure that they were working together regularly also paid off in terms of seeing a big reduction in the numbers of students termed "inactive». This is a somewhat grey area where students may sit for several months and then often decide to withdraw. We felt that we had been more successful in preventing students from lingering in this category for too long and actually helping them to remain active in the program. This may also have had an impact on the "completed" category; fewer people, perhaps, were ready to move on because they were satisfied with their program of work.

As with the students, we saw a significant increase in the percentage of tutors in both the new and returned categories remaining active over the three years. In fact although our overall numbers of tutors in 1994 was only three quarters of the numbers in 1992, the number (as well as percentage) of active tutors was higher in 1994 than in 1992. Similarly, the percentage of inactive tutors was more than halved over three years.

In short, both our student and tutor participation summaries demonstrated a significant movement in the direction of retention of tutoring pairs in the program. Our efforts to direct more of our energies and human resources to the support focus had brought positive results and we felt that we were well on our way to becoming a more efficient and cost-effective organization.

We could not continue to intake large numbers of students and tutors each year and expect to be able to give them the quality of support necessary to keep them in the program

Although our overall numbers of tutors in 1994 was only three quarters of the numbers in 1992, the number of active tutors was higher in 1994 than in 1992

3) Further Thoughts on Optimal Numbers

It is difficult to place an exact figure on the optimal number of matched pairs that can adequately be taken into and supported in a program in a one year period. However, the trend towards increased retention was very dear in our program. Two thirds of both new and returned students (66.5%) remained active at the end of 1994 as compared with 51% in 1993 and 49% in 1992. Given that the overall percentage of active pairs at the end of the year was considerably higher when we had 170 pairs in the program than when we had well over 200 pairs, this makes a strong case for "less" or "fewer" being more effective.

A Questionnaire

While discussing the concept of the optimal numbers of pairs that could be given strong support in a program, we decided to get feedback from other literacy co-ordinators. We faxed a brief questionnaire to a random sample of 30 co-ordinators in a range of rural and urban programs and asked them three questions about their work hours and their intuitive sense of appropriate numbers of pairs they could handle in their work hours.

Survey on Optimal Numbers of Pairs

a) How many hours a week are you paid to work?
b) How many pairs do you feel you can adequately support at any given time?
c) How many pairs do you feel you can adequately intake and support over a one year period (total new and and continuing)?

The Response

Sixteen co-ordinators responded (53% return rate). Of this number, seven programs (43%) gave a one-to-one correspondence of one hour worked for each tutoring pair they could support at any given time. Five programs (32%) suggested a lower ratio ranging from 40-55 minutes per tutoring pair, while three programs (25%) suggested a higher ratio of 1.25 to 1.5 hours per tutoring pair.

The majority of co-ordinators felt that they could accommodate up to one third more pairs over a full year than they might support at any given time e.g. if 20 was the optimal number of pairs at one time, co-ordinators felt they could handle perhaps 30 pairs over a year; if 60 pairs was the optimal number, around 90 pairs would be possible over a year.

Factors Influencing Numbers

There are many factors that have an impact on optimal numbers: the availability of volunteers, the recruitment of students, the travel distances in rural programs, the number of special needs students in any program, whether pairs meet on site or away from the program, how often students are re-assessed, the level and type of support provided to tutors, and so on. However, it seems reasonable to suggest that a one-to-one correspondence of hours worked to pairs supported might provide a reasonable baseline for literacy coordinators.

Prospects Optimal Numbers

Applying this guideline to our own program, we estimate that our core funding enables us to pay staff to work about 70 hours a week. Our optimal range of pairs at any given time, therefore, might be 60-80, while we might aim to provide high quality service to 90-120 pairs over one year. These numbers include up to 20% of students with developmental disabilities. Since we far exceeded these numbers in each of the three years examined, we might certainly ask ourselves whether we are trying to do too much with too few resources.

Undoubtedly, the funding received for projects also serves to support the core program, in that it enables us to retain more staff to share the workload, and thus to support more tutoring pairs. However, keeping in mind all of the volunteer hours contributed by staff it may be that we have simply tried to accommodate more working pairs than we can realistically support. This is an area we need to think about more carefully as we set our goals for the coming years.

Working with a Board of Directors

As more literacy programs begin to consider board governance or to go through the process of acquiring society and charitable organization status, co-ordinators need to carefully consider both the costs and the benefits to the program.

The Benefits

Certainly, the benefits include opportunities to fund-raise in a more substantial way by building a donor base, by applying to foundations for project funding and so on. Board governed

organizations also have the potential to recruit people with a wide range of business and professional backgrounds to provide the expertise needed to build the organization. A committed board of directors will also help to provide vision and long-range plans for the program.

In short, the benefits of board governed status are to ensure the financial stability of the organization and to provide expertise and guidance in the achievement of the organization's vision.

The Costs

The costs to the program include the additional time that staff will need to spend on both the intake and support focuses to ensure that the board is successful in its work. In the first few years of board governance, much time must be devoted to such tasks as writing bylaws, job descriptions and appropriate policies for the organization. The issue of whether a board is a working board or a governance board also needs consideration. That is, will board members actually carry out some of the work of the program or will it only set policy and monitor the results of the program plan. (see DuPrey, 1992 for a more detailed explanation of the stages of organizational growth).

Recruitment and orientation of new board members is an almost continuous process that staff as well as board must give time to. Also, the time that staff give to such tasks as planning, attending, writing reports for, and writing the minutes of board meetings is substantial. With the addition of committee work, even more time is required of staff since they inevitably need to become involved in most areas such as public relations, budget/finance, fund-raising personnel and other ad hoc committees.

This is not to discount the valuable individual and collective contributions of board members but rather to recognize the fact that recruiting and supporting a good board will not reduce the staff work-load but will in fact increase it. It will also increase it at a time when the organization may not be financially able to hire more staff to share the work-load. In the long run, however, if the organization becomes more financially viable and more successful in fulfilling its mandate then this outlay of staff time will have been worthwhile.

Thinking about a Board Structure?

Our advice to any co-ordinators thinking about developing a board structure would be first to do some reading about working with a board (see bibliography for some recommendations). They should then do as much advance planning as possible. They need to talk to people who have experience in the area, (for example, staff at a Volunteer Centre), to get a sense of all that is involved.

Co-ordinators might also make a start on developing job descriptions for board members, as well as bylaws and policies. They can do this by talking with other groups who have already been through this process. They should try to recruit people with board experience who can help to get a new board off to a good start. And they should recruit first members carefully to ensure that they not only have the skills needed but also have a genuine interest in the organization and sufficient time to contribute to board work. This latter attribute is perhaps the most important one for aboard member to possess.

Finally, co-ordinators should be prepared to put in some extra time to support a new board as it begins to work together. Just as it is important to support tutors and students in order to keep them in the program longer, so too it is important to support a board in order to keep them committed to and working for the program. With the application of the 50/50 principles to the board of directors it can become a valuable asset to an organization.

How Does 50/50 Apply to Funding?

Applying the 50/50 Concept to Funding

When we first read *Maintaining the Balance: A Guide to 50/50 Management* we were intrigued by the way it tied fundraising directly to the 50/50 concept. As DuPrey states "in the 50/50 System, program drives budget" (71). Thus, once a volunteer literacy organization has decided what it wants to achieve in the intake and support areas, it then looks for the funding to enable it to carry out its objectives.

Before working with the 50/50 concept, we had developed our own "fundable packages" based on our estimates of staff time and other resources needed to fulfill particular tasks. For example, in the intake area, we had estimated that the cost of bringing in one set of tutors (i.e. all costs relating to recruitment, orientation, training, assessment) was about $1,120. At an average 15 tutors per workshop, the cost of training one tutor would be about $75. As another example, in the support area, we estimated that the cost of providing one newsletter to tutors and students was about $1,200 (this included all writing time, desktop layout, printing, packaging, and mailing costs).

> Once a volunteer literacy organization has decided what it wants to achieve in the intake and support areas, it looks for the funding to enable it to carry out its objectives

These are the kinds of packages we used over the past two years as we began to develop a donor base. We did a couple of mailouts to about 200 individuals (mostly current or past students and tutors) and we raised a small amount of money using these packages.

However, as we began to use the 50/50 principles and we divided the entire budget into the two focus areas, we began to see our costs in more realistic terms. We realized we had been underestimating the real costs of our intake and support focuses. We had not included the costs of *all* human and material resources needed to achieve our objectives successfully.

> We realized that we had been vastly underestimating the real costs of our intake and support focuses. We had not included the costs of all human and material resources needed to achieve our objectives successfully

The Four Basic Funding Packages

DuPrey four basic funding packages, two for intake and two for support. In each area, the second of the packages is a finer breakdown of the costs shown in the first package.

Basic Funding Packages	
Intake	**Support**
•the cost to complete a tutor training workshop or •the cost to create an initial match	•the cost to support a match or •the cost to generate one instructional hour

The first step in developing the packages was to set our annual budget to reflect both our expenses and the income we would need to support the expenses. The expenses included all those incurred to run the program, including salaries for two staff, rent, utilities, office supplies, insurance, volunteer appreciation and so on. For purposes of this study, and in relation only to the core tutoring program, we developed a budget of $72,000. This did not comprise the entire Prospects budget which included a number of projects as well as small group workshops.

Based on the 50/50 principles, the $72,000 budget was then split into two to represent the intake and support focuses. Because we had already determined that we would do one less tutor training workshop than usual in order to give us time to strengthen the support focus, we decided to split the budget 40/60 (intake/ support). Thus the intake focus would account for $28,800 of the budget and the support focus would account for $43,200.

Our program objectives in the intake and support focus areas were set as follows:

Annual Budget	
Salaries	$56,000
Rent	9,600
Utilities & phone	2,400
Office supplies	1,300
General insurance	500

Intake

- To conduct 3 sets of 16 hour tutor training workshops
- To match 40 new pairs (12-14 after each workshop)

Support

- To support 156 tutoring pairs (40 new, plus 116 continuing)
- To provide 9,360 instructional hours through volunteer tutors (based on an average of 60 hours per student)

Board liability insurance	1,000
Volunteer Appreciation	1,200
Total	$72,000

Estimated Costs For Each of the Funding Packages.

Using DuPrey's formula, we then determined the costs of each of the intake and support packages.

Intake

· The cost to complete a tutor training workshop and related matches. This includes *all* costs related to intaking new tutors and students: recruitment, tutor orientation, tutor training, student assessment and orientation, matching

Intake amount: $28,800 divided by 3 training workshops =$9,600 per tutor training workshop

OR

· The cost to create an initial match

$28,800 divided by 40 initial matches= $720 per match

N.B. The cost of an initial match is "a finer breakdown of the cost to conduct a tutor training workshop." (DuPrey, 77)

We decided that the $720 per match cost is the most appropriate to use in our program, although the larger cost per workshop could also be useful in some instances.

Support

· The cost to support a match for one year

$$\frac{\$43,200}{156 \text{ pairs}} = \$276$$

OR

· The cost to generate one instructional hour

$$\frac{\$43,200}{9360 \text{ hours}} = \$4.61$$

The cost of an instructional hour is "a finer breakdown of the cost to support a match" (DuPrey, 77).

We feel that both these packages could be useful, although the support costs for one year could be broken into 6 month ($138) or 3 month ($69) packages, while the cost per instructional hour could be turned into smaller packages of 10, 30 or 60 instructional hours.

Table 7

Fundable Packages: Support Focus Objective					
Support a match	**1 mo.**	**3 mos.**	**6 mos.**	**1 yr.**	
	$23	**$69**	**$138**	**$276**	
Provide Instr. hr	**1 hr.**	**10 hrs.**	**20 hrs.**	**30 hrs.**	**60 hrs.**
	$4.61	**$46**	**$92**	**$138**	**$276**

DuPrey also describes an advanced 50/50 packaging process in which costs are broken down further into various components of the intake and support focuses. However, we felt that these basic formulae are sufficient for our fund-raising purposes.

We have not yet used these new formulae in our fund-raising efforts as we have been waiting for our new database software "Lit-Link" to be completed. This software will enable us to send out fund-raising letters using a customized mail-merge feature very quickly and easily. We hope to do our first mail-out using the new fundable packages in the spring of 1996. We will also need to revise our figures when our intake and support time becomes more balanced again, when budgets change and so on. Hence this process of developing fundable packages will be an ongoing one, with some adjustments made each year.

We feel though that using these formulae has given us a much clearer sense of the true costs of running the program. There are no longer any hidden costs; all facets of the program are accounted for in our new fundable packages.

Providing Support: Beyond Statistics

> We know that other literacy co-ordinators will have many similar stories to tell

It seemed appropriate, as part of this report, to put a human face on the concept of providing support to tutors and students. These are a few of many examples of how our extra efforts in the support area have made a difference to the quality of the learning experience for both volunteers and students. We know that other literacy co-ordinators will have many similar stories to tell. We hope that this written record of our stories will validate the experiences of literacy workers across the province as they work— often in underpaid and undervalued circumstances—to provide a high quality program for their students and tutors.

Pseudonyms have been used in all of the case studies to protect the identities of the people involved.

John Drops Out

> He had a good job in the trades, but he felt he got little support in his efforts to upgrade his literacy skills

John had been a student in our program for two years and had experienced many ups and downs. He had a good job in the trades, but he felt he got little support in his efforts to upgrade his literacy skills either from work or from home. He was frustrated at his inability to get a promotion when others with less technical ability were being promoted. He came to his tutoring regularly but rarely found time to do any work between sessions. He often questioned whether he was just wasting his tutor's time.

A number of small incidents brought John to the point where he felt he was making no progress, that he never would make progress and that he may as well just quit. And he did quit.

> John needed some concrete proof of his progress if he was not to succumb to failure once again

Staff members each talked to him in turn and pointed out areas where he had improved, but to no avail. A couple of weeks after he'd quit, we encouraged him to come in for a re-assessment in order to measure progress more accurately. This was a bit of a gamble on our part since we had no guarantee that his scores on an informal reading inventory would in fact have improved. But we felt strongly that John needed some concrete proof of his progress if he was not to succumb to failure once again.

Eventually, he agreed to come for a reassessment. We were delighted to learn that his word recognition and comprehension had increased two full grade levels and his spelling had increased one grade level. Reassured that he had been making steady gains, even though his commitment was very part-time, John came back to the program and was matched with a new tutor to provide some fresh ideas and enthusiasm.

He has been working with his new tutor for several months now and their work together has focused mainly on learning strategies for spelling the technical words required in his job. John is thrilled with his new ability to spell the words he must write on work orders. In fact he now finds co-workers approaching him for help with spelling. This of course has proved to be a real confidence booster and John is now much more confident about his abilities.

> The extra effort by staff helped him through a tough patch when he might easily have thrown away his efforts of the past two years

It would have been easy to give up on John when he quit, because he was so discouraged and determined to give up on himself. However, the extra effort by staff helped him through a tough patch when he might easily have thrown away his efforts of the past two years.

Jan Tries Again

Jan has been a student in our program for four years. She had only attended school for a few years as a child. Her goals were to open her own dayhome and to feel good about herself because she had never had a chance to learn. Jan, a single parent of four grown children was extremely shy and quiet when she first came into the program.

> Jan was first worried about letting us know that she was not comfortable with the match

Unfortunately her first match did not work well, mostly because the tutor brought her own emotional problems to the lessons. Jan was at first worried about letting us know that she was not comfortable with the match and, later, after we broke the match she was reluctant to try again. However, after several phone calls from our staff she agreed to be re-matched.

This time she agreed to meet her new tutor, Anne, at our learning centre where we could provide more support. Anne is a

sensible, upbeat woman who has been careful to focus on Jan's goals and to help her to continue to define and refine those goals. The staff too have encouraged Jan in each new step she has taken. She has enjoyed coming to the centre for her tutoring sessions because of the social and emotional support she receives. She has now achieved her goal of opening a dayhome and has learned to handle all of the paperwork associated with the job. She has also learned the importance of reading to the children in her care and she practices stories often with Anne. Over two years her reading skills increased by three grade levels and her spelling by two levels.

When we recently asked Jan to appear in a T.V. program about literacy and jobs she agreed with little hesitation. She did very well in the program and received lots of positive comments from friends who saw it. Jan has blossomed over the last couple of years and is friendly, outgoing and confident. She feels good about herself these days, and it shows.

Sarah Demands a Better Experience

Sarah was a retired teacher and an experienced volunteer when she came to our organization two years ago. However, she was also a disgruntled volunteer. She had volunteered for two other organizations (non-literacy) and had not enjoyed her work with them. She was unhappy with the training she received, as well as the lack of support when she was doing her assigned work. In her intake interview Sarah made it clear that she would not settle for another mediocre experience.

After she completed the fourteen hour tutor training workshops, which she said were excellent, we matched Sarah with an ESL student who works as a cook in a restaurant. Lin needed to learn cooking terminology and recipes, an area in which Sarah had considerable expertise. They were soon off to a good start and we certainly felt that our efforts in the intake focus had been successful.

We did nothing too out-of-the-ordinary for Sarah. She always came early for her tutoring sessions and enjoyed chatting for a few minutes with staff. She discussed her tutoring ideas often and occasionally asked for help. But generally she had an intuitive sense of Lin's needs and their sessions proceeded smoothly. As

Sarah began to feel at home with us she began to bring baked treats to share with us all.

She was also willing to help out in other areas when we needed extra hands. For example, she staffed the office several times when we needed volunteer relief. We also discovered that she was an expert at doing large mailouts and she taught us her highly efficient method. She also appreciated the additional in-service training we provided and she came to several sessions on math and spelling.

Sarah is still with us and has willingly accommodated a change in her student's work schedule so that they now meet in the evening instead of during the day. The remarkable thing about Sarah's case is that it didn't take a remarkable amount of effort to make her feel valued, appreciated and supported in her work. We simply followed the basic principles of volunteer management and she seems to have found the positive volunteer experience she was looking for.

Dora Doubles Her Duties

Dora has been with our program for about six months. She enjoyed the tutor training and made friends with several other tutors from that training session and they now get together regularly. With the support of the staff, she also organized a potluck get-together with her training group several weeks after training ended.

Like many new tutors she was at first a little apprehensive about her ability to tutor and needed lots of encouragement. She asked to work with a lower level student and we felt that she would be an excellent tutor at this level. We matched her with Chris and they met on weekday mornings at the centre. They quickly hit it off and worked well together. Dora is an empathetic tutor and a natural teacher; she and Chris worked well together for four months and they enjoyed coming to our learning centre. But then Chris' work schedule changed and she needed to go on hold for a while.

By now, Dora had developed confidence in her abilities and was quite willing to be matched with a second student until Chris was able to return. We offered her a real challenge in Cheryl, a student who has major personal problems including substance

She also appreciated the additional in-service training we provided and she came to several sessions on math and spelling

Like many new tutors she was at first a little apprehensive about her ability to tutor and needed lots of encouragement

abuse, and many experiences with Child Welfare and Social Services. Cheryl was a non-reader who had failed to meet on four consecutive occasions with the first tutor we matched her with.

We had almost determined that we would not be able to match Cheryl again because her problems were too much for a literacy volunteer to be expected to handle. However, all of the main matching criteria fit (meeting time and place, level of ability and so on) so we discussed this option with Dora. She was not fazed by this challenge and agreed to tutor Cheryl at our centre.

They have only met for five weeks so far, but Cheryl has turned up keen and eager to learn each time. Dora has been willing to listen to Cheryl's concerns without allowing them to take over their tutoring sessions; in particular she has helped Cheryl to think about how to approach her children's teachers about their difficulties in school. While there is always the possibility that Cheryl's life problems will consume her time and energy and get in the way of her tutoring, we feel that she is off to a promising start. Dora, meanwhile, is also writing to her first student as a way to keep her reading and writing until she can return to tutoring. Chris has written back, too, expressing thanks for Dora's ongoing concern.

Dora's innate empathy for people and her great common sense have enabled her to become a very successful tutor. But she certainly needed more than average encouragement and support as she started out. She then later appreciated the challenge of a more difficult assignment and has risen to the challenge admirably. As with Sarah, we did not go to extraordinary lengths to support Dora. By being sensitive to her needs both as a beginning tutor and then as one with growing confidence, we were able to offer her the degree and type of support she needed at the time she needed it.

Ron and Angela Make a Commitment

Ron, a non-reader, has been around our program, on and off, for more than five years. He was actually "blacklisted" before all of the present staff joined the organization because he had dropped in and out so many times that tutors were discouraged by him and they dropped out too. When he approached us one more time, we decided to place him in a small group workshop first to see whether he could make a commitment.

At first, it seemed Ron was following the same pattern; he showed little motivations, made excuses about not getting work done, and was generally lackadaisical about any ideas presented to him. In exasperation, a staff member sat down one day and had a heart-to-heart talk with him. She laid out her expectations of him for the rest of the workshops and provided a clear structure for his program of work. We thought perhaps he would not return the next week.

> She laid out her expectations of him for the rest of the workshops and provided a clear structure for his program of work

It seemed, however, that this was just what Ron needed. Perhaps no-one had ever cared enough to have this kind of heart-to-heart with him before. Perhaps his easy-going attitude belied his need for a more structured approach. At any rate we noticed an almost immediate change in his attitude. He showed up regularly for the rest of the classes and began to complete his assignments. He wrote his first piece of writing in this class. It read: "This is the first thing I ever wrote. I am proud of myself."

> "This is the first thing I ever wrote. I am proud of myself"

After the workshops were over we matched him with a newly trained tutor, Angela, who was herself lacking in confidence and a little apprehensive about her challenging assignment. She had felt, after going through training, that she would not be able to handle tutoring and she almost dropped out. After several discussions on the phone with Marg, she agreed to come in to the centre and observe a tutoring session of a well-established pair. This provided fresh motivation and the confidence to give it a try. She requested a beginning level student and we felt that she would get on well with Ron.

> After several discussions on the phone with Marg, she agreed to come in to the centre and observe a tutoring session of a well - established pair

They have been meeting for three months now and things are going well. Ron is taking books out of the library regularly, is always early for his tutoring sessions, and likes to lend a hand around the place. Angela has taken to tutoring without further hesitation and does not often ask for help. It is a real pleasure to see two people who were so reluctant at first make a strong commitment to learning together.

A Final Word

Over the past couple of years that we have worked with the 50/50 concept, we have found it to be a powerful tool for management of a volunteer tutor program. It has provided an ongoing reference point, a barometer by which we can quickly gauge the general health and well-being of our organization.

> 50/50 has provided a barometer by which we can quickly gauge the general health and well-being of our organization

Recently, for example, we were flooded by an influx of more than twenty new tutors whom we spent considerable time interviewing, screening and training. Likewise, we spent much time interviewing, assessing and orientating a comparable number of new students to the program. Flushed with our success in recruiting volunteers—who had been scarcer than usual over the past year—we got enthusiastic about holding another tutor training workshop while the going was good. We were on the verge of finalizing it when Marg suddenly said: "But you know, I just haven't had time to phone our current tutors since Christmas, and I really need to do that." We looked at each other, laughed, and in unison said: "50/50!"

That was all it took to remind us that the program was not running us, but rather we were running the program. Our active tutoring pairs were at 92, already above what we felt was an acceptable number. These pairs needed some nurturing and they weren't going to get it if we turned our attention to intaking yet another group of new pairs. We had reached the point where it was no longer acceptable to us to focus on intake only because students were waiting and tutors were willing to work with them.

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We recognize, however, that an alternative viewpoint suggests that providing a more limited benefit to many is better than providing a significant benefit to a few. Every program and every program co-ordinator must ultimately find the balance that feels right for their own situation. We feel that for our situation it has become impossible to feel satisfied with a continuously revolving front door. We cannot accommodate everyone who wants to come into the program without considering carefully whether we can support their learning while they are in the program.

We know that there will always be students waiting and undoubtedly we will lose some because they wait too long. There will always be tutors wanting to volunteer now, not in three or four months time, and undoubtedly we will lose some of those too. But we also know that we will retain most of the students and tutors already in our program much longer because of the support we are able to give them. And by keeping students and tutors in the program longer we are creating more sustained and more powerful learning. We are not just playing the "numbers game" but we are striving to provide the best learning experience possible for the students and volunteers in our program

Ultimately, it becomes the best learning experience possible for the staff too. The feedback given by satisfied students and tutors about their time in the program constantly reassures us that the time we spend on the support focus is well worthwhile. The inherent value and beauty of community-based programs like ours is that they enable us to touch people one at a time and make a difference in their lives.

> The feedback given by satisfied students and tutors about their time in the program constantly reassures us that the time we spend on the support focus is well worthwhile

This is true of what tutors do for students, as well as of what students do for tutors. And this mutual giving extends to program co-ordinators, to board members and to the whole community. We know that using the 50/50 Management model has enabled us to improve our literacy program considerably. And we know that if we keep the 50/50 principles in mind, we will continue to be able to provide a program that is efficient and effective while also retaining the human qualities that make our organization so much more than just a literacy program.

Appendix A

Time Tracking Sheet (sample)

	M	T	W	R	F	Weekly Totals		
Volunteer Management: Intake	/	/	/	/	/	/	/	/
Main Program								
Projects								
Volunteer Management: Support	/	/	/	/	/	/	/	/
Main Program								
Projects								
Student Management: Intake	/	/	/	/	/	/	/	/
Main Program								
Projects								
Student Management: Support	/	/	/	/	/	/	/	/
Main Program								
Projects								
Administration: Intake	/	/	/	/	/	/	/	/
Main Program								
Projects								
Administration: Support	/	/	/	/	/	/	/	/
Main Program								

Projects								
Fundraising: Intake & Support	/	/	/	/	/			
Non-Tutor Volunteers (Their hours)	/	/	/	/	/	/	/	/
Board Intake								
Board Support								
Library, Office and Special Events Volunteers								

Code: 1 = 15 minutes
        2 = 30 minutes
        4 = 1 hour

Definitions for Each of the Categories

Volunteer Management: Intake
Recruitment
Orientation
Training
Matching
Non-tutor volunteers
Travel
Projects (wkshops, Eval. 50/50 Job Shadow etc)

Volunteer Management: Support
Tutor consultation
In-service training
Recognition
Newsletters
Rematching
Travel time
Support group
Non-tutor volunteers (their hours also)
Projects (wkshops, Eval. 50/50 Job Shadow etc)

Student Management: Intake
Recruitment
Orientation
Assessment
Matching
Travel
Projects (wkshops, Eval. 50/50 Job Shadow etc)

Student Management: Support
Follow-up
Recognition
Newsletters
Student group
Resource materials
Re-assessment
Workshops
Networking with other agencies
Travel
Projects (wkshops, Eval. 50/50 Job Shadow etc)

Administration: Intake
Advocacy
Prof & Comm leadership
Grant proposals
Program promotion

Administration: Support
Budget setting
Book-keeping
Office/library maintenance & supplies
Curriculum development & pub
Program development/promotion
Conferences (Comm leadership)
Networking, meetings
Responding to enquiries
Special fundraising
Board meetings
Board reports
Board work

Fund-raising Intake & Support
Direct mail campaigns
Grant proposals
Casino
Community presentations
Committee time
Media Time
Sales of materials
Developing materials
Special events

Non-Tutor Volunteers: Their Time Given
Board Intake
Membership analysis
Selection, prep & nomination

Board Support
Orientation, training & assessment
Board Meetings
Committee work
Administration e.g. cheque writing, planning

Library, Office and Special Events Volunteers
Any work given by these volunteers in any area

50/50 Management Project Tally Sheet (sample)

Totals for September

General Categories	Pd hrs	Vol hrs	Total hrs
Volunteer Management			
Intake			
Support			
Student Management			
Intake			
Support			
Administration			
Intake			
Support			
Fund-raising			
Board Members			
Intake			
Support			
Grand Totals			

Appendix B

Job Description

Organization: Prospects Literacy Association
Title: **Board Member**

Function:
Responsible for providing the human, fiscal and community resources required to enable or enhance the capacity of the organization to achieve a balanced intake and support for tutors and learners. Board members are also responsible for providing the expertise and guidance required to conduct the organization's affairs.

Responsibilities:

1. Make a serious, long-term commitment to the cause of literacy.
2. Understand the goals, policies and programs of the organization.
3. Attend Board meetings and participate in the policy-making decisions of the Board.
4. Participate actively on one or more of the Board's committees suited to a member's interests and skills and to provide assistance on an individual basis to the organization's staff in areas of personal expertise.
5. Liaise with the community, interpret the organization's purpose and program and inform the organization of the needs of the community.
6. Take financial responsibility for the organization, making a personal financial contribution, however large or small, and assisting in some way with resource/fund development.

Qualifications:

1. Commitment to the purpose of the organization.
2. Willingness to commit sufficient time to be effectively involved in board meetings, a committee and the direction of the organization.
3. The ability/skills to provide leadership to the organization and to function effectively as part of a team.
4. Previous experience on a non-profit board is an asset.

Time Requirements:

Appointments to the Board are for a two-year term. Board members need to plan to attend the Annual General Meeting (June), up to eight Board meetings (Sept, - May) and a day-long, annual planning/goal setting meeting. Committee meetings are held periodically throughout the year.

Orientation:

An orientation session will be held with new board members prior to the first Board meeting. A Board orientation binder will also be provided.

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