

Active ageing in active communities



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Active ageing in active communities

Volunteering and the transition to retirement

Justin Davis Smith and Pat Gay



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Introduction

Aims

In recent times there has been increasing discussion about the part volunteering can play in the transition from paid work to retirement. One recent official publication noted that:

As well as providing a means to stay physically and mentally active, volunteering can provide a productive vehicle for successful transition from employment to retirement. (Scottish Executive, 2004, p 15)

Research suggests that older volunteers are generally quite positive about the satisfaction and fulfilment their volunteering provides and the important place it occupies in their lives (see, for example, Davis Smith, 1998). Volunteering gives retired people the opportunity to make a valuable contribution to society and for many it seems like a natural progression from paid work. If volunteering is so highly valued by the retirees involved, it begs the question as to why relatively few of them take the opportunity to volunteer and why the proportion of over 50s involved in volunteering actually falls after retirement age.

The Joseph Rowntree Foundation's research programme, *Transitions After 50*, was established to explore people's experiences, decisions and constraints as they pass from active labour market participation in their middle years towards a new identity in later life. While the topic of volunteering has been present in the wider debate, it has received less attention than other elements in the transition to retirement context, for example finance and income in later life.

This study is intended to throw light on the part played by volunteering in the transition by examining closely the experiences of volunteers and the organisations that involve them. The main focus of the study has been on 'what works' in relation to the involvement of older people as volunteers, and an important element was to uncover the factors that work against involvement and the steps organisations have successfully taken to overcome these barriers.

Background

An ageing population

The total population of the UK rose from 38.2 million in 1901 to 59 million by the end of the century. Over the period, with people living longer and the decline in the birth rate, the percentage of over 50s in the population rose from nearly one seventh at the beginning of the century to approaching one third by the end. Not only are the 'Young Old' increasing as a proportion of the population, a significant number have, in recent years, disengaged from the labour market. As Phillipson (2000, p 4) notes: "Among men in the UK aged 60-64, participation in the labour force declined from 82.9% in 1971 (with some fluctuations) to 54.1% in 1991. By 1999 the rate had declined to below 50%." Put another way, current Organisation for Economic Co-operation and Development (OECD) figures for the UK indicate that half of men leave the labour force at 62.6 years and live another 16.8 years without working, while women leave at 60.4, giving a retirement span of 22.3 years (Phillipson, 2000, p 7).

Such a shift has prompted government to act, for example by encouraging later withdrawal from the paid labour market to ease skill shortages and the demand on the public purse for pensions. McNair et al (2004) note that in the last 10 years there has been a significant shift in valuing older workers remaining in the workforce, reinforced by “a politicised discourse of demographic timebombs and untenable pension burdens” (p 69).

Age has been conceptualised as an inexorable progression from childhood to old age in a regular and predictable sequence. Moreover, this view has become so accepted that the development of welfare services has reinforced these assumptions, and in the process has characterised later life in terms of physical decline, dependency and social burden (Phillipson, 1997; Biggs, 2004). Biggs (2004) argues that this viewpoint has come under increasing strain due to three factors: demographic trends resulting in the erosion of rigid differences between age groups; an increasing variety of lifestyles of older people themselves; and “therapeutic and technological advances that increase bodily potential” (p 2).

All this will mean that people approaching the age of retirement will have a different attitude towards their retirement, and how they relate to the wider community, than those who retired before them. While negative stereotypes of older people still persist, older people at the start of the 21st century are healthier, better educated, have more disposable income and wider horizons than their predecessors (Walker, 1996). The old ‘carpet slipper’ image of old age no longer holds in the real world in the 21st century. Indeed, in a recent radio discussion about shaping programme schedules to appeal to the over 50s, one of the speakers described the over 50s as the new 30s.

From the 1970s, academics and policy makers began to challenge the old paradigm of a life cycle divided into the three stages of childhood and education, work and retirement (Walker, 1996). It was clear that there was a vast difference between people in the early stages of withdrawal from work and their compatriots 20 years down the line. Retirees could be divided into two rough categories, a younger group of those aged 50+ to 70, described by the term ‘Third Agers’, and an older group who would be

less active, in poorer health and increasingly frail (the Fourth Agers who are often “at the limits of their functional capacity”; Baltes and Smith, 2003, p 123). As Forster argues:

Third Agers, grey panthers, empty nesters, baby boomers, the chronologically gifted – these attempts to describe older people are a sign that society is waking up to the potential of the over 50s age group. (1997, p 13)

Far from being passive bystanders, Third Agers actively participate in community activities, learning, informal caring, leisure, part-time work and informal helping. Laslett sums it up as:

... an era of personal fulfilment, following the Second Age of independence, maturity, responsibility, earning and saving, and preceding the Fourth Age of final dependence, decrepitude and death. (1989, p 4)

The transition to retirement

From the 1980s, for many people the transition from employment to retirement can be described as something of a roller coaster. They might leave paid work because their jobs disappear in the economic–industrial shake-out, or because firms downsize in the wake of technological advances. At a time of recession there was encouragement for older workers to leave the workforce to make room for the rising number of school leavers. A decade later, concern about the composition of the workforce shifted the debate towards how to stem the flow of older workers out of employment and to remove age barriers in areas such as recruitment and retaining staff (Trinder et al, 1992; Taylor and Walker, 1993).

It can be seen that final withdrawal from the workforce was often preceded by a protracted period of uncertainty. Workers might be made redundant, take early retirement or be on sickness benefit but resuming full- or part-time employment from time to time in response to the demands of the economic cycle or recovering from periods of sickness or incapacity. But by the age of 65 the majority will have finally given up paid work, although this will change with the introduction of the proposed retirement age of 70. As Blaikie (1992) comments:

If the earlier 20th century witnessed the emergence and consolidation of retirement as a fixed phase, then the closing decade reveals a growing fragmentation. (p 3)

There is a variety of ways in which people fill the void left by work. In the immediate aftermath of leaving paid work it is not uncommon for the better off to take extended holidays, visit families or friends in far-away places, and take up or extend participation in sport and leisure activities. For everyone, a common scenario will be to spend time on catching up with domestic tasks they did not have time for while working, and many will be undertaking a caring role within the home or carrying out countless informal tasks in their neighbourhood or local community (Kelly, 1997, p 167).

There are, of course, other transitions over a lifetime, but these generally involve movement from one structure to another: retirement is generally a move from structure to no structure.

Volunteering in the transition

Leaving the workforce deprives people of the incidentals paid work generally provides: time structure, social contact, collective effort or purpose, social identity or status and regular activity (Jahoda, 1983). This chimes in with the later concept of what constitutes social exclusion and covers much the same ground. It could be argued that volunteering provides the 50+ cohort with a way of compensating for the losses identified by Jahoda, at the same time allowing them to escape social exclusion. Barnes and Parry (2004) argue that retirement and the preparation for retirement may prompt people to develop new social contacts, drawing upon a number of attachments of which voluntary and community relations are two.

Various surveys, however, have found that the 50+ age groups are the least likely to volunteer (Davis Smith, 1998). Davis Smith states:

It is an oft-stated paradox that despite the increase in free time after retirement, participation in all manner of unpaid activity outside the home declines. This is true both for leisure activities outside the home and voluntary work, both formal and informal. (cited in Hirsch, 2000, p 96)

The 1997 National Survey of Volunteering (Davis Smith, 1998) found that formal volunteering declines from about age 55. It also shows that while women are more likely to volunteer before they retire, men are more likely to do so afterwards. The survey found that people in social classes A and B are twice as likely to engage in some form of voluntary activity both pre- and post-retirement, although it does not take into account the prevalence of informal volunteering, for example helping out with shopping for a neighbour or keeping an eye on vulnerable people in the community. Davis Smith comments:

With older people shouldering the main burden of caring within, and informal volunteering outside, the family, it should not perhaps be surprising that participation in formal volunteering is lower than for the younger age groups. (cited in Hirsch, 2000, p 101)

Why retired people volunteer

In her study of health in later life, Bernard (2000) cites the most important factors that motivate members of the 50+ cohort to volunteer and it is clear that these echo those put forward in other studies of this nature. Some of the motivating factors were not very different from those applicable across the age range: the desire to help others, a need to feel useful and valued, the desire to make friends, and enjoyment of the activity itself. More age-specific factors were: putting a structure on free time, a way of continuing to use skills built up over a working life, and a route to learn and explore new avenues previously blocked by the demands of their careers or jobs (Bernard, 2000, pp 139-40).

Barriers to volunteering

Despite these motivating factors, it is clear from the evidence presented by Davis Smith (1992), Nyazi (1996) and Hirsch (2000) among others that volunteers in this age group can face a series of barriers that hinder, and sometimes even prevent, their participation in voluntary activity. The most obvious is the application of the statutory retirement age by organisations to older volunteers, in effect closing the gate at the very time would-be volunteers should be free to

enter. Organisations employing such a technique argued that they:

... found it easier to have a catch all limit than to decide whether volunteers should continue on a case-by-case basis. Such a policy, it was argued, had the advantage of making clear when the volunteer should leave without the need for interviews or assessment procedures. (Institute for Volunteering Research, 1999, p 3)

Some of the organisations that use post-retirement volunteers have restricted the types of volunteering they can engage in, for example preventing them from doing physically or mentally demanding work instead of assessing them as individuals (Nyazi, 1996). One study found that such ageist practices were prevalent in around 20% of organisations (Davis Smith, 1992).

Government policy

Governments of whatever hue claim to hold volunteering in high esteem. Over recent years, governments have introduced a range of programmes and initiatives aimed at encouraging more people to volunteer, particularly those groups in society that research has suggested have been underrepresented as volunteers, such as young people, people from black and minority ethnic (BME) communities and older people. Chief among initiatives aimed at the over 50s has been the Experience Corps, launched in 2001 with the aim of recruiting 250,000 older volunteers within three years.

Before the Experience Corps came The Home Office Older Volunteers' Initiative (HOOVI), launched in 1999, which had as its objective improving the quality and quantity of volunteering for those aged 50 and over. It set up pilots to identify existing good practice, promoting and publicising volunteering by older people, advancing knowledge about older volunteers and recruiting older volunteers (Rochester and Hutchinson, 2002).

Better Government for Older People (BGOP) started in 1998 and is now a UK-wide networking partnership of voluntary groups, local authorities and central government that allows older people as citizens to engage in decision making and in the development of strategies and services for an

ageing population. On the ground there have been many initiatives, for example independent groups that meet regularly to feed in the older person's perspective to local councils and the Wisdom Academy, which promotes lifelong learning. BGOP is now regarded as a key player in policy making and service provision.

With an eye to health improvement among older people, the Department of Health set up the Health Development Agency, which conducted a number of studies, some of which have featured the role of volunteering and identified the role of pre-retirement courses in disseminating the relevant information.

The issue of volunteering by older people has thus become of increasing public policy interest over the past decade. This study aims to contribute to the policy discussion by exploring the role of volunteering in the lives of older people, particularly during the transition period from paid work to retirement.

Methods

To achieve the aims of the study, the following methods were adopted:

- a review of the existing subject literature;
- detailed case studies of 11 organisations that involve older volunteers in their activities;
- in-depth qualitative interviews with 21 volunteers drawn from the case study organisations;
- face-to-face interviews with 12 national stakeholders active in the field of older volunteering.

Case studies

The case study sample was composed of a range of volunteer-involving organisations from different geographic areas, fields of activity and structures. In selecting organisations to take part in the case studies, an attempt was made to reflect the diversity of organisational forms contained within the voluntary sector. Of the 11 organisations chosen, eight could be described as straightforward service giving; two as hybrid membership/service giving; and one as characterised by hybrid task-swapping/social activities.

Of the service-giving agencies, five were local branches of national bodies or pilots for a national programme; the remainder had local roots. The second category comprised organisations with a large number of members, some of whom were active in providing service of some kind for fellow members. The last organisation was what may be best described as a broker in task-swapping and running club-like activities. Membership organisations were respectively an elders' forum project and a faith-based organisation. Table 1 gives further details.

Each case study involved a number of interviews:

- in-depth interviews with a volunteer services manager or coordinator and the chair or director if they existed;
- in-depth interviews with two or three volunteers, focusing on their previous volunteering activities or lack of them.

These case study interviews were designed to cover:

- organisational procedures and practice;
- benefits to organisations and volunteers;
- drawbacks to involving older volunteers;
- policy issues in relation to older people and volunteering.

The sample of volunteers

Finding volunteers who would be prepared to talk in detail about their lives relied on coordinators in the case study organisations approaching individuals on our behalf. By this means we assembled a sample of 21 people who were volunteering in retirement. Coordinators were requested to approach volunteers in their

50s or early 60s who had joined the organisation within the last year or so.

Despite their best efforts, many coordinators could not find volunteers who fitted the specification and the resultant sample included some older volunteers. The ages ranged from 59 to 81, some of whom had been retired for some time. However, because of the way the interviews were conducted it has not been difficult to plot the part played by volunteering in their transition into retirement with a good degree of accuracy.

In terms of post-16 education, the largest number in this sample had achieved secretarial, nursing, teaching or social work qualifications and sometimes other further education, pursued through evening classes or training offered by employers. Four of the sample had university degrees. Two of the volunteers who had missed out on school education took A-level examinations and a heritage volunteer studied for a certificate in landscape history, which she is following up with a diploma.

Jobs held by the volunteers before retirement covered a spectrum from the higher echelons of senior management in national and international companies through the middle range of jobs, secretaries, administration, teaching and nursing, to retail assistants and a handyman.

The interviews were carried out face to face and followed a semi-structured format. Each interview lasted for up to three hours and was tape-recorded and later transcribed for ease of analysis.

Table 1: Type and location of case study organisations

Type of organisation	Location
Elders' forum	London
Timebank based in rural area	North West
Information and support	South West
Faith-based voluntary organisation	London
Large hospice	North East
General hospital	Midlands
Heritage site	East Anglia
Branch of national mental health charity	North East
National charity for support and advice to older people in deprived areas	South West
Employee volunteering scheme	South East
Branch of national charity for older people	North West

The focus of these very detailed interviews was on how volunteering had featured in the lives of the older people and the part it had played in their transition from paid work to retirement. This yielded richly wrought accounts of informal and formal volunteering reaching back in many cases to early adult, even childhood, experiences and captured the essence of what influenced these individuals to volunteer.

It must be emphasised that with a sample of this size the findings must be treated with caution and, as with all such qualitative research, that they can be no more than indicative of the wider population.

Stakeholder interviews

Interviews with key stakeholders involved in policy formulation in the field of older volunteering were designed to shed light on the wider public policy issues relating to the engagement of older people in volunteering and to provide a broader policy context in which to place the findings from the case studies. Again all interviews were carried out face to face, using a semi-structured format. The interviews lasted for up to 90 minutes and were tape-recorded and later transcribed for analysis.

Structure of the report

In order to aid readability and to avoid unnecessary repetition, the data from the separate research methodologies has been brought together thematically to shed light on specific issues of policy and practice significance.

Chapter 2 examines the role played by volunteering in the transition process, looking at what motivates older people to volunteer and the extent to which volunteering can provide for some of the 'elements' lost with the end of paid work. The chapter draws a distinction between lifelong and serial volunteers who have a long-standing involvement in community activity, and trigger volunteers who have become involved in volunteering for the first time upon retirement.

Chapter 3 looks at 'what works' in recruitment terms and examines how organisations in the study have attempted to overcome some of the barriers that prevent older people from

volunteering. It also discusses what government can do to maximise the engagement of older people in the community.

Chapter 4 looks at issues of management and support, and the importance of 'flexibility' in the management role. It explores respondents' views of the benefits of older volunteering for all stakeholder groups – the volunteer, the organisation and wider society.

Chapter 5 draws together the diverse themes to give an overall view of what works well and speculates on the future for the next cohort of retirees.

Volunteering and the transition to retirement

This chapter explores the role played by volunteering in the transition to retirement. Drawing primarily on the views of older volunteers themselves, it reaffirms the mix of motives that lie at the heart of the decision to volunteer, and suggests that family influence and religion are important factors that have influenced people of this generation to volunteer. The study draws a distinction between lifelong and serial volunteers and new or trigger volunteers, and speculates that in an increasingly non-religious age, volunteering, for some people, allows the expression of what might be called the ‘helping ethic’ in secular surroundings.

Why older people volunteer

There is a comprehensive literature on the motivation to volunteer, mainly based on the range of reasons volunteers themselves give. By this method, most studies, for example Davis Smith (1998), come up with a continuum with self-interested motives at one end and altruistic ones at the other. It has been consistently found that volunteers usually cite more than one reason.

This mix of motives identified in previous studies was mirrored in this study. The most frequently mentioned motivation for volunteering was to “keep the brain active” as was the concurrent dread of indiscriminate “telly watching”. “Feeling good” was also important, and one volunteer compared it to how he felt when he donated blood.

Most of the sample mentioned their desire to help others and to affirm caring and compassion, which volunteering allowed them to do. Volunteers saw it as a simple matter, needing no

further elaboration; in the words of one of them: “I just want to help. I don’t want money, I don’t want any medals, I just want to help”. Volunteers strongly expressed the feeling of wanting to give something back, typified by one volunteer who said:

“Actually I didn’t expect anything for myself, all I wanted was to give something back. I mean my husband died of cancer, me mum she died of old age, but in the last few months of both their lives, they needed hospital care and that’s what they got, and it’s my way of giving a little bit back, that’s just my way. I couldn’t afford to go out and give them a couple of thousand pounds, I haven’t got it, but I can give them a little bit of help.”

For some older people, volunteering had clearly played a crucial role in the transition process. Commenting on the need to adjust to changed circumstances, one volunteer reflected on her thoughts in the run-up to retirement: “When you retire you just basically can’t work, you start getting a pension and you’ve got to rearrange your life to adapt it to another way”.

A number of specific examples were given of individuals continuing to make a meaningful contribution through volunteering once the opportunity to do so in a work environment was cut off. For example, a former postmaster who had owned a busy shop serving 1,500 regular customers a week said:

“Elderly customers look on the postmaster as some sort of social services. They come with their problems so I suppose I could say it was a big influence, dealing with all those people, helping out with problems,

not just financial problems, they used to come with all sorts of things. The post office is very full-time work. So when I retired I thought it is going to hit me unless I find something to do.”

Another example concerned a high-level executive in a PLC company:

“People are so involved with their work that they face a vacuum when they retire, and a charity presents them not with an opportunity so much to occupy their time as to continue being in charge and having the status or on paper the status they had when they were working.”

Lifelong, serial and trigger volunteers

By definition, everyone in the sample was currently volunteering but close examination of their volunteering history revealed differing experiences and these had an impact on the way they negotiated the transition to retirement. Analysis of the volunteers’ previous experience led to the development of a threefold typology that categorised them as:

- lifelong volunteers
- serial volunteers
- trigger volunteers.

Lifelong volunteers

For this group of people, volunteering in retirement was a continuation of volunteering they had done throughout their lives, informally, formally and in some cases, both. Nearly half the sample came into this category and examples are given in the following box.

Elaine¹, a volunteer in a faith-based organisation, worked continuously in her organisation from her 20s, moving from hands-on work with young children through serving on committees in roles of steadily increasing responsibility to become a representative on prestigious national and interfaith committees.

Roy at the job-swap organisation started his career in volunteering when he and his young family settled in a village community more than 40 years ago. He has been involved sequentially in church work, fundraising, organising fetes, fairs and harvest festivals. He has been a parish councillor and supported endless village events.

Serial volunteers

Serial volunteers were those who volunteered intermittently throughout their lives. A typical example might be women who had perhaps volunteered before their children were born. There might be a gap of several years while they were juggling the demands of work and family life but once the children had left home, they became involved in volunteering again. There were fewer volunteers in this category than in the lifelong or trigger categories. Examples are given in the following box.

Barbara started her volunteering career as a Sunday school teacher and helping out in a youth club when she was in her teens. After a break in volunteering of several years she became a school governor and, after the death of her husband, secretary and treasurer at the local church. After moving house, she worked in a local daycentre and in a museum.

At the age of 14, Anne had volunteered as a carer but later on, when married and with family responsibilities, she did not have time to take on voluntary work until some years later when she and her husband had emigrated to Rhodesia. While there she was heavily involved for many years in church work and as hospice befriender. Returning to England, she became a befriender for a mental health charity, later joining the local committee.

¹ All names given in the report are pseudonyms.

Trigger volunteers

For this group, volunteering was typically a response to wanting to put the time freed up by retirement to good use. Nearly all were first-time volunteers, many of whom spent some time testing the water of retirement before committing themselves to formal volunteering. As one of them put it: “At the start, you do things you have put off doing for lack of time, but there is only so much golf you can play, gardens you can do and rooms you can paint”. Death of a cared-for person was also a trigger in some cases.

The role of religion, family and place

While this study could not identify background characteristics that, statistically, make people more likely to volunteer, it could identify those characteristics that *appear* to play an active role, in the accounts of volunteers, in predisposing them to volunteer.

The main influences reported by the volunteers clustered around:

- religion
- family influence
- geographical stability.

Religion

Around three quarters of the sample had a history of formal religion as children, attending services with their parents, Sunday school and being part of the religious congregation. About half of those volunteers who had a background of church attendance still attended church but the others did not, either ‘drifting off’ or making conscious decisions to stop doing so. Nearly all thought, however, that religion had left a residual ethos that was part of the underlying propensity to volunteer. The importance of good works on their own, decoupled from formal religious observance, was implicitly acknowledged and is well illustrated by the following comments.

“I think all major religions require you to help other people. I mean Hindus and Muslims too are very great at helping people less fortunate than themselves in a voluntary way, so I think it doesn’t have to be Christianity, but I think there is a good spark of it somewhere, and it doesn’t matter

which of the major religions you belong to, I think it comes through that belief that you should help without seeking reward.”

“I just think it’s a basic principle that runs through all major religions, I don’t think it’s anything to do with a particular religion and I think it’s one of the things that makes humans different from animals in some ways, it’s their ability to stretch out and help.”

In the faith-based context, volunteering was woven deeply into the fabric of belief and members had no hesitation in seeing a seamless progression from early religious teaching to present-day volunteering.

Family influence

As powerful, if not more powerful, was the influence of family and the way the respondents felt they were brought up. Most volunteers described what appeared to be close relationships with their parents. They painted a picture of family life that portrayed the handing down of attitudes and values described variously as “Christian”, “something I’ve grown up with” or “setting a good example”.

Volunteers who grew up in the 1940s, 1950s and 1960s gave accounts of the kind of values parents implanted. Basically, these were that they should help others; informally in lending a hand to neighbours who needed it, or more formally by joining organisations. The following comments were typical:

“We were brought up properly, we were taught to respect people, God’s creation, the animals and everything else, and show respect to everybody and everything. My dad used to say, ‘Son, if you can’t do anyone a good turn, leave them alone, don’t do them a bad one’, that’s remained with me, that’s the code I’ve lived by.”

“My aunt was very religious and she did love her charity work. So indirectly I was involved in helping birds and animals and the poor, so you know because of her nature that might have influenced me to an extent, I reckon.”

As well as describing how values had filtered down, people talked about the day-to-day aspects of their early life, giving a vivid account of interaction with aunts, uncles, cousins and grandparents. Several of the volunteers made spontaneous mention of happy childhoods. “We were poor but we had a very very happy childhood, very happy”, was how one volunteer expressed it.

This and the influence of religion are firmly intertwined and difficult to disentangle but together form what might be termed an ethical legacy.

While highly speculative, it is tempting to see undertaking voluntary work as fulfilling the need to undertake good works outside the confines of a conventional religious setting. In effect, volunteering allows for the expression of what might be called ‘the helping ethic’ in secular surroundings.

Geographical stability

Many of the volunteers lived in or near the area where they were born or had been in their present neighbourhood for many years, and seemed to have good social networks. These factors are known to have a positive connection with the propensity to volunteer. For example, the 1997 National Survey of Volunteering found, as had earlier surveys, that both domestic stability and the relationship between people and their neighbours were significant for involvement in volunteering (Davis Smith, 1998).

The study reinforces the suggestion from other works that volunteering is at least in part a reflection of good social networks; people who know more people are, not surprisingly, more likely to be invited to take part in a range of community activities. But the relationship may also be working the other way as well, in that through volunteering people extend their range of social contacts and build up their stock of social capital.

Comparison with paid work

The study sought to tease out how volunteers perceived differences between working as a volunteer and a paid employee.

Generally, the sample volunteers did not make comparisons on a practical level, like similarities or differences in structure or style of management; rather they drew attention to less tangible aspects: cultural differences, the attitudes and commitment they brought as volunteers, as illustrated in Table 2. The lack of a cheque or wage packet was taken as given.

Table 2: Working as a volunteer and a paid employee

Similar	Different
Having discrete duties and responsibilities	Culture and ethos of voluntary organisations
Solving problems	Lower level of stress
Devoting energy	Quality of commitment
Using specific expertise	

Undertaking a duty like befriending a client on a regular basis and being responsible for turning up at an agreed time were seen as very similar in both contexts. The sometimes quite heavy responsibilities of helping to guide an organisation and overseeing finances were consistent with what some of the volunteers had done as employees.

A trustee volunteer captured something of the essence of the similarities when they commented:

“So I think there’s a lot of mileage in letting people know they will be bringing the best from their working life through into volunteering without having to go through the nasties that they give them, and they will have some new things that they’re being challenged with which they didn’t have before.”

Cultural differences between paid work and volunteering would be more visible to volunteers in some roles than others. For example, a trustee, examining at some length his initiation into the volunteering ethos, said:

“It took me a number of months to get used to the rhythm and tempo of the voluntary sector. I don’t deny that I tended when I first came here to be a bit chop, chop, and then I had to realise of course that the culture, the tempo and the rhythm within the voluntary sector is not that at all, you have to adjust.”

Another volunteer pointed out that their experience of the commercial world is that it is outcomes-driven as befits the profit motive, in contrast to the more *laissez-faire* attitude they had encountered in their voluntary capacity.

Some of the volunteers felt the great advantage of working as a volunteer meant that the tasks they undertook were less stressful and also that for most of them volunteering occupied significantly less time than was the case with paid work, leaving time for relaxation and other pursuits.

Volunteering also had the added advantage of being less contractually binding than paid work. As one volunteer said:

“OK, you’ve got what you might call a fall-back position, volunteering, and you know if you don’t like it you can just terminate it immediately and say bye-bye, whereas if you were, as most of us were, dependent on the company for our salary, then you had to put up with quite a bit.”

But for most volunteers, leaving would not be undertaken lightly. As one volunteer put it:

“If you have to go to a paid job you’re expected to be there every day 9–5. With volunteering you could afford yourself the luxury of saying I can’t be bothered. But I don’t think people who volunteer would do that lightly, if they’ve got the will to do something for nothing they will do it because they feel obliged and bound to do it, to honour their commitment to it.”

These comparisons between their paid work and volunteering help to give an enhanced understanding of the transition terrain. They point to features common to both and differences that go beyond the superficial, and how volunteering draws on and is influenced by the experience of paid employment. Some of the volunteers felt that it would be helpful if an explanation of this different ethos could somehow be incorporated at some stage of the induction process.

Given that, for many retirees, volunteering is one of a range of options people can choose and that organisations have to compete for volunteers, it is helpful to consider to what extent volunteering

becomes a way of continuing their work careers by other means. Do volunteers who had enjoyed high ranking in their paid work want to take on less demanding tasks in their voluntary role or vice versa? Examples were offered of both directions.

The personnel director of a large company dearly wanted to work in a shop and was happily doing so two years later; a senior social worker worked in a daycentre and a top-flight engineer was enjoying doing the hospice garden.

But people were much more likely to go for opportunities that allowed them to use the skills they had acquired over a lifetime’s work. This was particularly true for trustees who had formerly held powerful positions in PLCs. Coordinators expressed a desire to hold on tight to high-profile individuals as they were well aware that the specialised expertise the volunteers contributed was way beyond anything they could afford to buy in.

Similarly, retired civil servants, administrators, nurses and teachers would be matched to tasks that suited their work experience and preferences. For the greater part, retired volunteers appeared to take on tasks that were not too dissimilar from those they were accustomed to, in administration, caring, or directing. Role reversal was unusual, but whether this was the preferred choice of the volunteers, or was due to pressure from the organisations to fill certain roles is unclear.

Implications for policy and practice

- Older people’s motivations to volunteer (just like people’s of all age groups) are mixed. For some older people, volunteering is an opportunity to put something back into society; for others, volunteering provides a chance to continue learning new skills and tasting new experiences; for yet others, volunteering offers a means of making the somewhat painful transition from a lifetime of paid work to retirement. Organisations need to recognise the diversity of motives that drive older people to volunteer and create meaningful opportunities to meet individual needs. For some older people, this will involve an opportunity to embark on activities very different from the world of their paid

work. For others, it will mean an opportunity to continue with the same sorts of activities undertaken during their paid career.

- Some older people volunteer because they have always done so. Others come back to volunteering later in life following a break for work and family responsibilities. But for some older people retirement is the trigger that inspires them to volunteer for the first time. Organisations and policy makers need to understand more about the nature of this trigger response and what can be done to stimulate it into action. Further examination is required of the steps to be taken to ensure that older people with no history of volunteering are presented with opportunities to get involved following their retirement. The role of pre-retirement education in the trigger process is discussed in the following chapter.
- Some older people will look to volunteering to replicate many of the aspects of paid work lost upon retirement, such as formal organisational structure and tight time discipline. Others, however, will be looking for volunteering to provide a complete break with the world of paid employment. Organisations need to be aware of these different requirements and to structure their volunteering activities accordingly. Some older people will find the move to a more relaxed working environment unsettling and will require help and assistance to settle in. Others will be drawn towards the informality and lack of bureaucracy that some volunteering can offer.

Involving older people as volunteers

This chapter examines some of the organisational issues surrounding the involvement of older people as volunteers. It confirms what previous research has found: that word of mouth is the key way by which (older) people find their way into volunteering. It explores some of the barriers that work against the involvement of some groups of older people, including negative and restricted images of volunteering, and looks at the steps organisations have taken to try and widen participation. It suggests a role for government in creating a supportive policy framework to maximise the engagement of older people.

Recruitment

Coordinators in almost all the case studies had recruitment strategies that adopted a broad-brush approach and found, as is commonly reported, that word of mouth is one of the most effective means of engaging all people, including older people, in volunteering.

Although effective word of mouth was found by some to be a somewhat hit and miss approach, coordinators had to be proactive as well, employing standard practices like advertising in public places, for example shopping malls and post offices, local press and radio, parish magazines, newsletters and websites. Aware of the importance of nurturing contacts, one coordinator said: “We’ve nurtured and cultured most of the solid local journalists into understanding what we do ... we give them human stories”.

As regards deliberately targeting the over 50s in general, and retirees in particular, some coordinators did so by providing presentations

on pre-retirement courses, taking part in promotional videos, devising special literature and supplying speakers where older audiences could be expected, like Women’s Institutes and pensioners’ groups. These tactics worked well but coordinators felt they had to be content that the considerable effort involved would yield perhaps only one or two people at any one time.

The experience of the efficacy of pre-retirement course slots was generally felt to be disappointing, with a tiny number signing up on the spot and a few more coming forward later, perhaps after a bereavement that left the individual with more time on their hands. The few volunteers who had attended them thought volunteering tended to get lost among all the advice for financial products and holidays. It was suggested that a different approach might be more fruitful, perhaps arranging for a second-stage course to be run after six months when people had gone through the initial phase of enjoying freedom, and boredom might be setting in.

Another avenue that had a measure of success was placing adverts in the newsletters that are sent out periodically by large employers like local authorities or hospitals to all their retirees.

Targeted recruitment of this kind was held to be necessary in service delivery organisations, but membership organisations were felt to operate in an altogether different environment. In these organisations it was said that volunteering “just happens” and stems from shared religious beliefs, ethos and interests. Respondents from these organisations felt it is common for members to think they are just “doing something that needs to be done” and do not consider themselves as volunteers at all.

Barriers to volunteering

It is clear from the evidence presented by Davis Smith (1992), Nyazi (1996) and Hirsch (2000) among others that volunteers in the 50+ age group can face a series of barriers that hinder, and sometimes even prevent, their participation in voluntary activity.

The general consensus among the coordinators in this study was that their organisations did not have any barriers to participation, but this was qualified in some cases by reference to factors outside their control, either imposed by practical restrictions, or obstacles embedded in society's value system. Much of the discussion centred on fruitless efforts coordinators had made and these failures throw light on the magnitude of some of these difficulties.

Practical barriers identified by coordinators were:

- insurance arrangements;
- lack of access for disabled volunteers;
- legislation on health and safety;
- lack of resources to create opportunities;
- health of volunteers.

Insurance was mentioned as a barrier by some respondents, although in one or two cases a way round the restrictions had been found. For example, in the case of a hospital volunteer programme, although the voluntary organisation that managed the programme did not provide insurance cover to volunteers over the age of 75, the hospital where the programme was based did. The membership organisations generally had a blanket insurance policy that covered everyone regardless of age.

Lack of access for disabled volunteers was something coordinators felt they had little control over as disability-friendly venues were few and far between and they felt there was no simple solution to making suitable access to premises at the top of flights of stairs or in inaccessible locations. Another point raised about the difficulty of working with disabled volunteers was that they often had support needs that coordinators felt were beyond the capacity of the organisation to provide.

Some coordinators in the health care field felt health and safety regulations militated against the use of volunteers because of the need to be

registered with Care Standards. As one respondent said: "Putting on someone's cardigan can be construed as a personal care task and registration would come in...."

Another obstacle to the participation of older volunteers was lack of suitable opportunities. There were many examples of where coordinators knew they could create more opportunities for the over 55s but were prevented from doing so by lack of staff time and financial constraints.

Cultural obstacles were seen as altogether more intractable. Almost all recognised the absence of older volunteers from BME communities and made efforts from time to time to broaden their recruitment, usually without much success. Leaving aside that some of the organisations operated in areas where there was not much of a BME presence, rural Cheshire or Dorset for example, others in city areas had tried but made little or no impact.

One such organisation had achieved some limited success and the coordinator's account provides very useful insights into the difficulties of recruiting this group of people and how progress can be made. She began by describing a project providing a daycentre for Asian elders that only one person ever attended and was later closed down. She had been told that the reason for the failure was because no one had any understanding of the cultural implication of expecting two different Muslim groups to use the same facility. She continued:

"Since I've been in post the way I've been doing it is by working with groups that are already working in the community, by setting up a project with African/Caribbean or Asian groups to provide a project between us, and that's the way we've kind of got into the community. I think it's the only way to do it, rather than us, a predominately white organisation, trying to go there, and I think that's part of the issue in volunteering as well. We have just recruited our first black volunteer."

One city centre organisation did report a reasonable number of black and Asian volunteers but attributed their success to the previous director who was Asian herself and brought in contacts because of that. Another organisation

had worked hard in trying to find approaches to the minority groups in their area and although they had gone to community leaders and workers in BME organisations in the hope they would disseminate information through leaflets and flyers, this had not materialised.

Improving recruitment among retirees

On the whole, the volunteers were baffled as to why more retirees did not come forward to volunteer and quoted examples of friends and ex-colleagues who seemed to have nothing positive in their lives, but felt there was no glaringly obvious way to recruit more of them. They identified two main underlying difficulties: the image of volunteering; and the lack of awareness of the interesting opportunities and rewards volunteering can offer.

The image problem

Volunteers felt that the public's image of volunteering was that it was solely concerned with charity shops and fundraising for big projects like Comic Relief and Children in Need. In their view, what comes over is that, while organisations make efforts to inform the public of what money is spent on, they fail to say enough about what work they do.

Lack of awareness of what volunteering can offer

In considering the broader question of why the take-up was not greater among retirees, there was a general feeling that the message of how rewarding volunteering is does not get across to people. Some had encountered the 'why do something for nothing' syndrome among people they knew, and felt that raising awareness of the satisfactions volunteering could bring was the only way to counter such attitudes.

Marketing

Given the image problem and the lack of awareness, volunteers felt that volunteering should be much more vigorously promoted. This should start with more advertising and large-scale public relations campaigns aimed at retirees by

organisations focusing on the enjoyment factor and emphasising the variety and high quality of the jobs and challenges on offer. As one respondent commented:

“Well if it's going to improve, it's marketing isn't it basically, it's got to become much more upfront with what roles there are which a volunteer could fulfil, and what's in it for the volunteer if they do take it up, and probably a lot more marketing in terms of 'try before you buy'.”

Discussing the issue of how publicity might be improved, one volunteer suggested large posters, photographs of ordinary older people, posted in bus shelters on the basis that pensioners use buses and revolving adverts are something to look at while they wait interminably for the next bus! A solution was felt to be needed to the problem of getting the message across. As one volunteer said:

“How can we get people to understand if they don't know what the subject is... Understanding the audience and using the right language would be good for starters.”

A more novel approach perhaps, one that was also referred to by a coordinator, was that organisations should set up 'a half day in the life of a volunteer' taster sessions that could be circulated to all local firms. In the words of this volunteer:

“It would be interesting for a person coming up to retirement age to observe what goes on, even if it's only sitting at a desk doodling on a piece of paper with things happening all round you or a session at a daycentre, whatever interested a particular individual.”

What would work: how government policies could help

There was an overall consensus among the stakeholders that the government needs to do more about pre-retirement planning generally, with the suggestion that policy planners should bring together some of the key agencies to take a really broad look at the next 10-20 years.

There were several ideas about what the government could do to make volunteering a more prominent component in the transition to retirement, most specifically promoting the concepts of phased retirement and lifelong learning, and developing the role of pre-retirement education.

Phased retirement

Stakeholders felt that employers should be sensitised to the idea of phased retirement. It was not enough for employers to send workers on a pre-retirement course three months before they were due to retire and leave it at that. They saw phased retirement as being about developing flexibility for older employees in a way that would give them opportunities to pursue other activities alongside paid work.

There was some support for an American model, also in operation in some large companies in the UK, where there are schemes that allow people coming up for retirement to have time off during the week to work in a voluntary capacity. Typically they may start with half a day a week in the year running up to retirement and increase the amount of time as retirement gets closer.

Phased retirement in which people have had a chance to see for themselves what they can get out of volunteering rather than including it as part of a pre-retirement course alongside a host of other topics was felt to offer a huge advantage. As far as promoting volunteering is concerned, stakeholders felt that however good the presentation or a video might be, there is no substitute for real experience that could either confirm retirees in their volunteering role or alternatively allow them to reject it after personal experience.

Another factor in promoting phased retirement was that people would have to be assured that it would not jeopardise their pension. Stakeholders had noted that there were misunderstandings about the effect on pensions so that people felt unable to undertake anything they thought might be a risk to their entitlements.

Stakeholders felt that, for many retirees, letting go of a bit of responsibility in the work context and picking up a bit of responsibility somewhere in the volunteering world gives a much longer

and therefore smoother transition between work and retirement and that the two can actually work together. As one stakeholder said:

“Flexible retirement is the key word – we need a more flexible retirement strategy so that people can go early if they wish to or go on working on a part-time basis, say three or four days a week and use the other day for their own purposes of which volunteering may be one.”

Lifelong learning

Taking the opportunity to build on the enthusiasm and appetite for life of the Third Agers as a starting point, some of the stakeholders were convinced that the volunteering movement had a large part to play in facilitating lifelong learning. In this scenario the worlds of work and volunteering were conceptualised as parallel universes with training opportunities being the same for both. There would be state-financed packages including free courses and incentives for retired people to take up a ‘volunteering career’. For example, they could build on their life’s experience of children and grandchildren by studying for qualifications that are nowadays required for working with young children. Such training and accreditation, it was felt, would have beneficial effects all round.

Implications for policy and practice

- In recruitment terms, organisations need to recognise that, while word of mouth may be the most effective method of engaging older volunteers, other more proactive approaches will be required if a broader range of people are to be involved. The study suggests that successful outreach programmes will include presentations on volunteering and what it has to offer to gatherings of older people, for example pensioners’ groups, and mailshots to the recently retired through such mechanisms as company retiree associations.
- Organisations need to take firmer action to remove the barriers that prevent certain groups of older people from engaging in volunteering. Removing arbitrary retirement ages for volunteers is one obvious course of

action and looking for ways of overcoming the problems of insuring older volunteers is another. The government also has a role to play in this respect in terms of trying to influence the behaviour of the insurance companies and by setting a good example in the way in which it involves volunteers in the statutory sector. Organisations should also take greater steps to involve older disabled people as volunteers and not hide behind the obstacles of inaccessible buildings and resource constraints. Government again can set a good example in the way in which it seeks to engage disabled people in volunteering in the public sector.

- More also needs to be done to engage older people from BME communities in volunteering. The study points to a number of successful strategies that have been employed in this regard and highlights the importance of outreach work and partnership working with the BME community.
- The negative image of volunteering held by some older people remains a barrier to fuller engagement and the study suggests that more needs to be done to challenge the 'myths' of volunteering and to showcase its benefits for older people, particularly during the transition process from paid work to retirement.
- Government and employers should look carefully at the concept of phased retirement, which would allow older people approaching retirement an opportunity to take part in volunteering within their local community while still in employment. The study suggests that there is ample scope to develop pre-retirement education so that volunteering features much more strongly in the menu of post-retirement activities and options. A second-phase, post-retirement course may have value in raising awareness of the volunteering option after the initial flush of retirement euphoria has begun to wear off.

4

Management and support

This chapter looks at the issue of management and support of older volunteers. Appropriate management and support were found to be essential in ensuring that the benefits of volunteering by older people were maximised for the good of the volunteers, the host organisation and the wider society. The study suggests that flexibility in management style, underpinned by a strong organisational commitment to support, training and rewards, lies at the heart of the successful engagement of older people as volunteers.

Style of management

Most of the management techniques described by the coordinators apply to volunteers regardless of age. They recognised that for older volunteers (as with all volunteers) there was a mix of motives at work that required a mix of management styles to be employed. While some older volunteers described their involvement primarily in terms of altruism – “paying back” or “helping to make things better” – others were looking to volunteering as a chance to learn new skills and experience new opportunities. Consequently, the opportunities older volunteers were given, and the way in which they were managed – the degree of formal training for example – had to be tailored to individual circumstances.

For most coordinators the emphasis was on creating goodwill and trust, building up teamwork and ensuring volunteers get enjoyment from what they do and a sense of community. As one respondent said:

“It’s not a resource to be exploited – volunteering is something people do if they want to and to feel part of the team. I’m just as much part of the team as they are – I can’t do without them. That’s how I work. One of the keys is not getting something out of somebody for nothing.”

The basic role of the coordinator is to be a facilitator, to be supportive and friendly (Gay, 2000) but the case study coordinators felt that, in addition, they needed to accord a due measure of respect to older people for their life experience and the advanced skills they could bring to tasks. Management takes on a different dimension in membership organisations. In this context, the job of the coordinators was more passive in nature, helping members who wanted to be active, for example with an information service or a travel club. In the case of the faith-based organisation, coordinators helped service groups of members whose roles might be collecting things for gift parcels, transport for older members, fundraising, organising entertainment rotas or providing back-up to religious observance.

Flexibility

The implications for coordinators and their style of management are immense. They acknowledged that it had been a common expectation on their part in the not-too-distant past that volunteers would fit into whatever timetable the task demanded. But all that has changed radically and, to keep abreast of these changes, coordinators had to realise that flexibility was indispensable in managing older volunteers.

With flexibility as the watchword, coordinators established at the interview stage what the applicant's lifestyle was like and what their availability would be over the short and medium term. In practical terms, coordinators approached variable availability in different ways and as the tasks demanded. For example, in one organisation volunteers could go on a regular rota or in a 'bank' where they could be called upon as needed. In the heritage context, the manager drew up an annual schedule and posted it in the volunteers' common room where volunteers could trade places if necessary. How they dealt with variable availability is well summed up by the following coordinator:

"Just this week we've had one of our older volunteers whose mother is very ill and she's had to say she can't actually give us time at this moment. So long as they let us know we can usually cover for them. We make sure when we interview them the time commitment will suit the service they're working with. We weed out when we first talk to them whether we thought it was going to be an issue because for instance for the information advice line we ask for a commitment of one day a week for a minimum of a year and that you know we say that right from the beginning ... so it's quite clear what we'd be expecting."

Process of selection

At the service delivery end of the spectrum there was a fairly consistent pattern in selection and placement. Once a would-be volunteer expressed interest, most of the organisations sent an information pack with an application form and would generally follow this up with a phone call within two or three weeks. Once the application form had been returned, it would be followed by an interview. At the heritage site, the manager would have a fairly informal chat, introduce him or her to other volunteers and leave the volunteer to wander round the site. This had proved very effective; hardly anyone had dropped out at this stage and retention had been excellent. Some have role descriptions and agreements setting out what the organisation expects and what the volunteer can expect in return. References are taken up and induction and training are offered.

What volunteers do

The tasks the volunteers do and the amount of satisfaction they derive play an important part in the transition process.

The case study organisations covered a very wide spectrum of tasks. The following Table gives a summary.

Table 3: Tasks carried out by volunteers

Task	Examples
Administration	Photocopying, filing, envelope stuffing, reception desk
Befriending	Visiting isolated people, supporting carers
Information and advice giving	Providing information, advice and advocacy
Practical tasks	Small works, gardening
Welfare/therapy-type tasks	Talking to patients, members providing services for fellow clients and fellow members
Trusteeship	Serving on boards

Tasks the sample volunteers perform in both the membership and service-giving organisations reflect the diversity and scope of voluntary organisations, and range from hands-on service to clients and members to the high-profile decision-making roles of trustees and board members. An individual may have more than one role, for example helping with administration, speaking at meetings and travelling worldwide on behalf of the charity.

Coordinators broke down the tasks into broad categories, but volunteers themselves revealed an altogether different dimension that provides important insights into how tasks can allow for the expression of creativity and caring that other activities do not. As one volunteer explained:

"You might be only serving tea or coffee, but you're doing more than that because sometimes these people come to the counter and they can't carry anything, and you take it to them and see that they're settled.... You're helping that person and that's what it's all about in my eyes, it's helping somebody."

At the other end of the scale, a treasurer, whose organisation turns over nearly £1 million a year, drew up a long-range action plan for expansion and relocation that involved fundraising and endless visits to estate agents to find suitable premises.

Another volunteer, who described themselves as a “dedicated salesman”, said they used clever tactics to become known to the psychiatric unit so they could persuade them to let them set up a patient information point for their mental health charity. Not only did they succeed in this but they were asked to contribute to training courses for the doctors and nurses.

What these examples indicate is that behind what may sound like an ordinary, even uninteresting, task there may be room to exercise creativity, entrepreneurship, a high standard of work and to apply qualities of empathy and good sense.

Most coordinators usually had heavy work loads and felt the time needed to reflect, scan the horizon and come up with ideas for expanding opportunities was limited, but there were some exceptions. An age-based organisation was proud of its Speak Easy Project. This project involved interviewing older people about their experience and satisfaction with home care as part of the social services review of the system in the borough. Several of the volunteers reported that interviewees appreciated being interviewed by someone in their age group rather than “a statutory person we can’t understand”.

Support

Part of the successful management of volunteers involves support and the level will vary according to the tasks and the kind of organisation. Most coordinators had an open door policy so that volunteers could come in at any time if they were concerned about anything or just for a chat. Some had regular supervision meetings and support was given on an ad hoc basis to others. ‘Keeping an eye open’ for the volunteers’ welfare would perhaps be more of a feature for this group of volunteers. In some cases, volunteers supported each other and if they were part of a staff team, in the hospital setting for example, support would be forthcoming from staff.

Recognition and rewards

What might be termed a ‘reward system’ is multifaceted and volunteers were asked if volunteering had helped to fill the gap left by paid work in any of the following ways: providing a time structure; getting out of the house; meeting people/colleagues; feeling part of things outside the home.

Most of the volunteers agreed wholly or in part with these overarching ideas, which can be seen as rewards available to volunteers of any age but would be particularly applicable to retirees.

Factors that could be seen as particularly apposite to retirees – keeping the brain active, sharing in success and meeting new people – appeared regularly in the volunteers’ list of rewards. Less specifically, enjoyment and pleasure were almost universally cited as rewards.

As well as the overarching benefits of volunteering, many gave detailed accounts of their rewards, both intrinsic to the work and extrinsic as shown in Table 4. Volunteers appreciated a “thank you” or a “well done” when offered by clients or coordinators. While some declared that they did not want, in the words of one, “money or medals”, they were nevertheless appreciative of formal recognition by the organisation and spoke warmly of being included in trips and events with other volunteers and staff.

For one heritage volunteer, being able to indulge an interest in art at the same time as performing a service to the visiting public was seen as rewarding, particularly as it had led to further study and involvement.

Table 4: The rewards of volunteering

Intrinsic	Extrinsic
Positive feedback from clients/coordinators	Enjoyment Pleasure
Inherent interest of work	Keeping the brain active
Recognition by the organisation	Feeling good Social contact
Sharing in success	Meeting a challenge

Training

Training occurred in several different ways:

- on the job;
- attendance at a training programme;
- training alongside staff;
- training to improve particular aspects of the work.

On-the-job training was essentially ‘watch what Nelly does’, and was considered appropriate in settings where anything more structured was not required, for example in the outpatients’ department where volunteers in the ‘meeting and greeting’ role would quickly catch on to the job by observation and common sense.

This would not, of course, be viable when volunteers were working with carers of vulnerable patients and in this case they would be obliged to undertake several training sessions before starting. If volunteers wanted to improve skills in a certain direction, opportunities were sometimes made available to participate in higher-level courses, sometimes alongside staff. A good example was an IT course that a volunteer took so he would be better able to perform administrative tasks.

Benefits to the organisations of involving older people

There was unequivocal endorsement by the organisational representatives of the view that the benefits of having older people as volunteers were substantial and far outweighed any disadvantages there might be for the organisation. Many things were placed on the plus side:

- strong commitment;
- time;
- loyalty;
- establishing good rapport with people in their own age group;
- understanding of older people’s issues;
- doing the job;
- good retention.

Commitment was seen as essential for the smooth running of the organisations and likely to be strongest in the older cohort. Commitment

and loyalty resulted in a high retention rate and coordinators reported that older volunteers stayed for long periods. There was remarkable consistency in the coordinators’ experience that retention was excellent and that volunteers left only when their circumstances changed or their health declined to the point where the tasks became too much. At the heritage site, ex-volunteers were encouraged to come in when they felt like a chat with their old colleagues, to have a cup of tea in the volunteers’ common room and to use the library.

There was variability in the amount of time the older volunteers contributed each week: some put in a full 35 hours but the average was five hours, in line with what other studies have found. If travelling times are added in, this comes up to roughly a day’s input. Retired people were able to give time, particularly during the day when working people were not available.

Due to the varied nature of volunteers’ contributions, organisations said they had not attempted to put a figure on the value of the volunteers’ contributions, but the heritage coordinator said that the rule of thumb for him was that six volunteers equated to one equivalent full-time paid member of staff.

Establishing a good rapport with the older age groups was seen as an obvious bonus and examples have already been given. This and loyalty were highly rated. In the hospital, volunteers were seen as adding value to the work of every department they worked in and offering patients time and a degree of understanding that hard-pressed professionals are not always able to offer. In particular, befriender volunteers, because of their life experience, were seen as uniquely placed to bring understanding and comfort and an ability to empathise, adding a dimension that was felt to be often outside what younger staff could give.

As for doing the job, the coordinator in the mental health organisation, the majority of whose volunteers were over 50, could demonstrate that they added considerably to the work. She did so by pinpointing 2002, when fundraisers raised several thousand pounds, befriending and information services were delivered, and an information point established at the general hospital. The committee provided strategic

direction and worked on detailed plans for future development.

Other coordinators agreed that the input of committee members adds immeasurably to their work. Put simply, organisations could not perform or plan for the future in the way they do without the work of the retired volunteers. More generally, the advantages of having older volunteers were seen as being able to call on their energy and, in the case of the recently retired, a link into the wider working world.

As well as direct benefits to the organisations, coordinators felt there were benefits to volunteers and to society as a whole too.

Benefits to the volunteers

One coordinator pointed out that she had never seen any controlled trials of the health benefits of volunteering, but common sense and her own experience left no doubt in her mind that volunteering played a part in maintaining good health and in some cases even restoring it. She said:

“I hear from sons and daughters who live all over the country, and one lady writes to me from France thanking me because her mother is here ... she wrote, ‘We were despairing, all she ever did was sit at home and read, or she was becoming a couch potato’. So the families are pleased they’re occupied and they make a lot of friends. Pride in achievement and by extension self-esteem are also benefits.”

Most agreed, and these points were also made strongly by the volunteers, that the good effects were most often in keeping the mind active, meeting people on a regular basis and getting out of the house, especially for those experiencing the death of a spouse after a lifetime together.

Benefits to society as a whole

In considering benefits as they might apply in the wider society, coordinators identified two main themes: those that had immediate effect, and a deferred benefit for later generations. Chief among the immediate benefits was the part

played by volunteering in social inclusion for older people.

In the case of membership and job-swap organisations it is easy to see that providing opportunities for social interaction is all or part of their *raison d’être*. In the case of some immigrant men, for example, who had spent their lives working in gangs, living in bedsits and failing to build savings, could find themselves stranded on the bank of social exclusion once they retired. For them, membership of the elders’ forum gave them a route to social inclusion again, an important factor in the transition to retirement.

The effects volunteering can have on people who have been socially excluded are admirably captured in what the hospital coordinator said:

“The volunteers look out for each other ... they’re pleased to be doing something, a lot of them were unemployed for long periods and thought they’d never work again and all of a sudden they’re necessary and they’re made to feel wanted by the people they work for and I do my best to make sure if any of them is ill or needs something and they ring me at home sometimes just to say ‘hello’. So it’s like a little community within a community.”

Several people expressed the view that one of the spin-offs of volunteering is that it helps preserve something of lasting worth. The heritage context is a prime example. The coordinator’s view was that:

“Volunteering for us has enduring appeal to people with a strong interest in art and architecture who feel they are helping to preserve the natural beauty of the countryside, old or interesting buildings, and the myriad beautiful objects that adorn them. Benefits to society are incalculable, not just for the present but extending far into the future.”

Less obviously, in other organisations volunteers were felt to bequeath an intangible legacy in contributing to a public asset that keeps the organisation alive for the next generation. At a more down-to-earth level, another coordinator said: “Seeing volunteers around and doing useful things gives encouragement to others and shows that when they get to the age of retirement it

doesn't necessarily mean that all they can do is sit in front of the telly all day".

Implications for policy and practice

- Styles of volunteer management will vary according to the nature of the organisation and the types of volunteering being undertaken. In some organisations, a more formal style of management will be appropriate; in others a much more light-touch approach will be required. Organisations should look to introduce the most appropriate management style for their particular type of agency and to best fit the needs and requirements of their older volunteers.
- The study suggests that a flexibility of management will be required to take account of the varying needs and interests of older volunteers. In particular, organisations should look to offer a flexible approach in respect of types of activities undertaken and time commitment required, to enable older people an opportunity of fitting volunteering in to their increasingly busy post-retirement lives as part of a 'portfolio career'.
- Organisations should consider creating volunteering opportunities specifically for the over 50s and should consider whether the standard support and training on offer is appropriate for their older volunteers or whether tailor-made systems and procedures are required.
- Organisations should look to develop appropriate reward and recognition systems that fully recognise the unique contribution made by older volunteers.
- Organisations should look for ways of better selling the benefits of volunteering for older people and of disseminating the message that older people have a unique and essential contribution to make in their communities.

5

Conclusions and recommendations

The study has ranged widely over the experiences, opinions and perspectives of volunteers, coordinators in voluntary organisations and stakeholders' ideas about how government policies can be geared to support volunteering by retired people. What has broken new ground is using volunteers' life histories, which have allowed unprecedented insights into the life worlds of older people.

It should, however, be recalled that the study findings are drawn from small samples, and it is therefore not possible to know to what extent they reflect what is happening in society overall. What they do is provide a snapshot of volunteering by a particular group of retired people and highlight the importance of volunteering in the lives of older people.

Before going on to the general conclusions, we begin by looking at definitional issues raised by the study. They cluster round what meanings are attached in this context to:

- older people
- retirement
- transition
- volunteering.

Older people

In earlier times, older people were often characterised as a group of individuals of inferior worth, their usefulness exhausted, tucked away from the mainstream and with little further to give to society. But this has changed as older people are seen to be exercising choice, taking some share alongside younger people in the good things of life and benefiting from educational opportunities and leisure pursuits.

Nowadays, older people are more likely to be looked upon as an active, often vibrant, group able and willing to contribute a great deal to their communities through volunteering and more generally to society as a whole.

Some organisations in the study recognised two stages in the ageing process: the 50-70 age group when, generally speaking, volunteers were in full control of their lives, followed by the over 70s age group when people might, to some degree, be winding down their activities.

In this definition being over 50 is not a disqualification from volunteering: it is doing the job that counts and, in recognising this, the voluntary organisations in the study consistently tap into the potential of the so-called Third Age.

Retirement

In recent decades, the meaning of retirement has changed from the idea of people 'being put out to grass', entering a phase of diminished responsibilities and reduced purpose in life. Nowadays, retirement is seen as a multifaceted stage in the life cycle with opportunities to use free time in ways that please the individual. As the study shows, retirees may have a range of activities: perhaps a time-consuming role in caring for a family member at one end of the scale and, according to circumstances, the opportunity to indulge in desired pastimes at the other.

For many, retirement offers hitherto unavailable scope for choosing what they do on a daily basis and this autonomy may be an option for the first time in a person's life.

Transition

The hypothesis behind the Joseph Rowntree Foundation's Transitions After 50 programme was that during a transition people might develop new identities and activities, as part of an adaptive process that established a pattern one would expect to last beyond the transition itself. This research suggests that people are divided between those who volunteer on a lifelong or serial basis and those who are triggered to volunteer at this stage of life as part of a transition to retirement. However, the evidence seems to show that it is rather late in the transition process that the trigger group do so – once other patterns have been established – and that therefore it does not tend to be the first or primary feature of retirement patterns or identities.

for lifelong learning and as a way of contributing to productive ageing.

For some, it was a mini world of work allowing the exercise of skills, already finely honed during paid employment, fitting nicely in the constellation of other activities. For them and others, it was a way of gaining important psychological and emotional rewards.

In the membership context, people were more likely to see themselves as taking on an active role in helping to maintain the organisation and/or caring for other members than as volunteers.

The presence of religion, practised now or in the past, and a culture of helping were notable features in the backgrounds of many of the volunteers, regardless of the type of organisation or the voluntary tasks they carried out.

Volunteering

As the sample included some retirees who were members of their organisations rather than volunteers in the formal sense of the word, it became clear that the distinction between the two situations is blurred. The question arises as to what degree membership of a faith-based organisation, or one whose main purpose is social, can be regarded as volunteering and what part these groups play in the lives of retired people.

This type of participation sits more comfortably in the realm of informal volunteering: what has been termed the fourth sector approach (Williams, 2003). Whichever way it is labelled, such participation is one of a range of things retirees can place in their portfolio of activities.

What works from the organisations' perspective

High standards of management practice with regard to older volunteers were commonplace among coordinators in the study. Good practice, underpinned by an understanding of the changed and changing face of older age and retirement, resulted in tailoring volunteering to the individual's preferences, aptitudes, expertise and crucially, in many cases, their multifaceted lifestyles.

Organisations benefited from the experience, commitment and capacity of older people and frequently their long service, widely seen as far outweighing any disadvantages there might be. As well as the gains that volunteering traditionally confers on volunteers, most coordinators kept a discrete watching brief on their health and wellbeing.

What works from the volunteers' perspective

The vast majority of volunteers in the study were happy with their volunteering, which was widely seen as giving the opportunity to participate in something that was both meaningful and enjoyable while being less stressful than paid work. It was seen as a way of keeping a toehold in the mainstream as well as offering for some the possibility of much appreciated opportunities

Coordinators demonstrated an awareness that people from BME and blue-collar backgrounds were underrepresented in their organisations and some had tried, largely unsuccessfully, to redress the balance. The general feeling was that they did not have the resources to devote to the sustained effort needed to diversify recruitment.

While some coordinators created new opportunities for volunteering, others did not, either because they could not see the need to do so or for lack of resources.

What the study showed was that the largely standard management practices organisations deployed worked well, but as far as recruitment is concerned they were in a sense ‘preaching to the converted’, since so many had previous experience of volunteering. Therefore, organisations will need to develop new strategies for attracting older people for whom volunteering is not familiar territory. They could achieve this through better marketing, a more entrepreneurial approach, and creating opportunities at the organisation level: in short, they need to be able to demonstrate to older people generally that what is on offer is for them.

Implications for the future

Finally, we turn to speculation about what the findings might mean for retiree volunteering in succeeding cohorts. It proceeds on the premise that the factors identified in the background of the study volunteers – religion and family values – underpin the shaping of helping behaviour.

The starting point is to look at factors reported by the study volunteers that could be seen as having played some part in their propensity to volunteer. These were: religion, family attitudes and values, to which could be added economic and geographic stability.

Volunteers in the study spent their formative years in the aftermath of the Second World War, which has been described as “brave, semi-collectivist years ... a combination of hope and public purpose” (Hennessy, 1992, p 453). As the experience of the study volunteers revealed, jobs were for life and people did not move house much outside the area where they were born, neither was there much ethnic diversity.

The rising generation of older people will have grown up in a very different cultural world where the collective ethic has been replaced by individualism and consumerism. With the sharp decline of religious observance and changing family structures, influences that pervaded earlier cohorts may no longer be there. Greater

geographic and economic mobility may also militate against involvement in volunteering.

If these buttresses to volunteering and the spirit of voluntarism are no longer in place, volunteering will be operating in a different social and intellectual climate. This begs the question of how a more secular and polarised society might retain the helping ethic without the background elements that predisposed participation by the study volunteers.

At this point it may be useful to consider what governments might be able to do to stimulate volunteering in the next cohort. Two tentative suggestions present themselves.

The first is to engage interest in voluntarism at an early age through citizenship classes in schools that contain a strong element of practical volunteering experience for their students and an accompanying collaboration with local voluntary organisations to provide the opportunities. As a result, some could be expected to acquire a taste for volunteering that they may well carry forward to adulthood, becoming serial if not lifelong volunteers and, by extension, volunteers in retirement.

The second concerns the role of employers. Employee volunteering, in which employers allow time off, sometimes paid, for their staff to participate in local voluntary initiatives, has been a growing movement in the last few years. Encouraging this movement could lead to increased numbers continuing to volunteer into retirement.

As regards phased retirement that contains a volunteering element, government can encourage employers in two ways: as a large-scale employer itself, it can set an example by embracing both employee volunteering and phased retirement.

Companies that offer phased retirement are usually larger enterprises that have the resources to make it a widely available option. Funding resources for small- and medium-sized businesses to do the same would open up phased retirement possibilities to a much greater number of people as they approach retirement age.

Ways of promoting formal third sector volunteering are well known and have been tried

and tested over many years. Another, less well charted, area where government help might be fruitful in involving retirees would be in promoting informal, fourth sector volunteering.

A further speculative idea concerns the future role of formal volunteering as the means by which people have the opportunity to express their caring nature. With the decline in church attendance among the UK population and the consequent closure of church buildings, there is the possibility that voluntary organisations will, in the future, become the repository of individual acts of caring and goodwill. If this is the case, there will be a need to create institutions and structures that measure up to the realities of an increasingly secular society.

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