

## Volunteering in retirement

**Volunteering can play a significant role in people's lives as they move from work to retirement. Yet various barriers, both institutional and attitudinal, appear to be deterring people from taking up volunteering later in life. A study by Justin Davis Smith and Pat Gay of the Institute for Volunteering Research interviewed older volunteers and volunteering organisations to explore 'what works' in the involvement of older people as volunteers.**

- For some older people, volunteering offers a 'structured' means of making a meaningful contribution in society once the opportunity to do so through work has been cut off.
- Whilst some older people volunteer because they have always done so, for others retirement is the trigger for volunteering for the first time.
- Some older people look to volunteering to replicate aspects of paid work lost upon retirement, such as organisational structure and time discipline. Others, however, look to volunteering to provide a complete break with the world of paid work.
- Several barriers to older people volunteering were highlighted, including: insurance restrictions, health and safety regulations, and lack of access for disabled people.
- Older volunteers from black and minority ethnic communities were under-represented. Organisations had tried to broaden recruitment, usually without much success. This was put down to lack of resources for outreach work and to deep-rooted issues around the image of volunteering. Organisations which had had more success pointed to the importance of working with community leaders and black and minority ethnic groups in their community.
- The researchers conclude that:
  - organisations need to do more to broaden the base of recruitment;
  - organisations may need to be more flexible about the activities and time commitment they require, to enable retired people to fit volunteering into their increasingly busy lives;
  - there is scope for rethinking both pre- and post-retirement education, and 'lifelong learning', to ensure that volunteering better meets the needs of older people in retirement;
  - policy-makers need to understand more about what might trigger people to volunteer on retirement if policies are to maximise volunteering by this group.



## Background

When people retire from paid work, often before state pension age and in good health, one way for them to keep active and involved in their communities is to volunteer. Yet reported volunteering rates among people in their 50s and early 60s are lower than at earlier ages, and rates are lower among people who do not come from professional or managerial backgrounds.

This study, carried out by the Institute for Volunteering Research, looked at the part played by volunteering in the transition from paid work to retirement by examining closely the experiences of volunteers and the organisations that involve them. An important element was to uncover the factors that work against involvement and the steps organisations have successfully taken to overcome these barriers.

## Different types of volunteer

Older people's motivations for volunteering were mixed. For some older people volunteering was an opportunity to put something back into society; for others it provided a chance to continue learning new skills and tasting new experiences. For many older people volunteering had played an important role in the transition process, with respondents drawing attention to the contribution of volunteering in helping to fill the void sometimes felt upon retirement. As one older volunteer commented:

“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 ... they had when they were working.”

The study classified older volunteers into three groups:

- those who volunteer because they have always done so ('lifelong' volunteers);
- those who have come back to volunteering later in life following a break for work and family responsibilities ('serial' volunteers); and
- those who are inspired by retirement to volunteer for the first time ('trigger' volunteers).

## Pre-retirement courses

The role of pre-retirement courses in triggering volunteering was found to be mixed. Some success was reported but organisations and volunteers were generally disappointed with the results, feeling that volunteering tended to get lost among the advice for financial products and services. However, respondents felt there was ample scope to develop pre-retirement education in the future to ensure that volunteering features much more strongly in the menu of activities in retirement. One option put forward was for a second-phase, post-retirement course, held perhaps six months after a person had retired, which it was felt might have more success in raising awareness of volunteering after the initial flush of retirement euphoria had begun to wear off.

There was also support for 'phased retirement' schemes in which people approaching retirement are able to take time off during the working week to try out different forms of volunteering in a range of organisations. Typically, they might start with half a day a week in the year running up to retirement and increase the time commitment as retirement gets closer. As one policy stakeholder commented:

“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.”

## Recruitment

The study found that word-of-mouth was the main way in for most older volunteers. However, although effective, some volunteer co-ordinators found it to be a somewhat 'hit and miss' approach and one that did little to help encourage different types of people to volunteer. Organisations that had been successful in opening up volunteering to under-represented groups had adopted a more proactive approach, such as the employment of out-reach workers and the direct mailing of people who had recently retired through such mechanisms as company associations.

## Values, family and place

Respondents who had been active in volunteering throughout their lives drew attention to what can perhaps best be described as the existence of an ‘ethical legacy’, informed both by religious and humanistic impulses and a strong history of family commitment to volunteering and service. Volunteers who had grown up in the 1930s and 1940s gave accounts of the values their parents had implanted – the importance of lending a hand, helping others and joining organisations – which they saw as being fundamental in influencing them in their decision to volunteer. The study also points to a link between volunteering and geographic place in that many of the volunteers lived in or near the area they were born, or had been in their present neighbourhood for many years, and had built up extensive social networks.

## Barriers to volunteering

Several barriers to the involvement of older people as volunteers were raised. These included insurance restrictions, health and safety regulations, and lack of access for disabled people. Cultural obstacles were also highlighted. Almost all organisations in the study recognised the under-representation of older volunteers from black and minority ethnic communities, and many had made efforts from time to time to broaden their recruitment, usually without much success. This failure was put down to lack of resources to embark on outreach work and deep-rooted issues to do with the image of volunteering. Organisations which had been successful in diversifying their volunteers pointed to the importance of partnership working with community leaders and black and minority ethnic groups in their community. As one manager put it:

“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.”

The study highlights the need for organisations to recruit more older volunteers from non-professional backgrounds. There is a tension between the increasing pressures towards formalisation and the need to respond to the desire of some older people to volunteer in a more informal, less workplace-like setting.

## Management and support

Styles of volunteer management varied according to the nature of the organisation and the types of volunteering being undertaken. In some organisations a formal style of management was deemed appropriate; in others a much lighter touch was the norm. The study suggests that flexible management styles will be required to take account of the varying needs and interests of older volunteers. In particular, organisations may need to offer a flexible approach in respect of types of activities undertaken and time commitment required, to enable older people to fit volunteering into their increasingly busy post-retirement lives as part of a ‘portfolio career’.

## Benefits and rewards

The study highlighted the significant benefits older people received from their volunteering, including the opportunity to meet people, to undertake a challenge and to keep the brain and body active. Organisations also pointed to the enormous benefits of involving older volunteers in their work. Many things were placed on the plus side, including the loyalty and commitment displayed by older volunteers that resulted in long periods of involvement and high retention rates. Volunteer co-ordinators also highlighted the benefits older people brought to the wider community through their volunteering, both in terms of the delivery of essential services and the combating of social exclusion and the building of skills. One volunteer co-ordinator expressed the benefits thus:

“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 would never work again and all of a sudden they’re necessary and they’re made to feel wanted by the people they work for ... .”

## Lifelong learning

Taking the opportunity to build on the enthusiasm and commitment of older volunteers, respondents felt that the volunteering movement had a large part to play in facilitating lifelong learning. In this scenario the world of paid work and volunteering were seen as parallel systems of activity with training opportunities available in 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 being parents and grandparents by studying for qualifications that are required for working with children and young people.

## Conclusions and recommendations

The study adds to our understanding of the role played by volunteering in the lives of older people undergoing the transition from paid work to retirement, and of the steps to be taken by practitioners and policy-makers to maximise the benefits. The findings challenge organisations to broaden their base of recruitment to include those groups of older people currently under-represented as volunteers; and to structure and organise volunteering opportunities so as to enhance the benefits for all stakeholder groups – the volunteers, organisations, and wider community. The findings also challenge government and other policy-makers to rethink both pre- and post-retirement education and the whole lifelong learning debate to ensure that volunteering is better positioned to contribute to meeting the needs of older people in retirement.

## About the project

The study, undertaken between 2003 and 2004, was based on the following methods:

- a review of the existing literature on volunteering and ageing;
- detailed case studies of 11 organisations which involve older volunteers in their activities;
- in-depth qualitative interviews with 21 volunteers drawn from the case study organisations;
- in-depth interviews with 12 national stakeholders active in the field of older people and volunteering.

The report was written by Justin Davis Smith and Pat Gay of the Institute for Volunteering Research, a specialist research and consultancy agency on volunteering established in 1997 by the National Centre for Volunteering (now Volunteering England) and the University of East London.

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## For further information

The full report, **Active ageing in active communities: Volunteering and the transition to retirement** by Justin Davis Smith and Pat Gay, is published for the Foundation by The Policy Press as part of the Transitions after 50 series (ISBN 1 86134 585 2, price £11.95).

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