## An Exploration of Learning through Volunteering during Retirement

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#### **Abstract**

This study explored learning among older adults engaged in volunteer activities. While the study of learning in older adults has traditionally been neglected, there is an increasing interest in lifelong learning. In light of this, learning opportunities and goals may be important for volunteer engagement and retention. This mixed methods study first asked older volunteers, 55 to 75 years of age, about their learning opportunities. Subsequently, learning goals were examined through a survey involving a Canadian sample of 214 individuals who were also 55 to 75 years of age. Examples of volunteer-related informal learning and formal education were described by participants as well as the importance of learning and being mentally active and engaged. The implications for volunteer resource management are discussed and some suggestions for future research are given.

## **Key Words:**

volunteers, older adults, lifelong learning, retirement, volunteer resource management

### Introduction

The Canadian Council on Learning (2006) suggested that "you don't stop learning when you grow old; you grow old when you stop learning" (p. 2). For older adults, engagement in volunteer activities is an excellent way to continue learning and being mentally engaged.

Lifelong learning is the gaining of knowledge across the life-span (Jarvis, 2004). Adults of all ages have lifelong learning needs for development, for ongoing cognitive stimulation and in order to be engaged, productive and contributing members of society (Hoare, 2006; Illeris, 2004; Livingstone, 2008, 2010; Schugurensky, Slade, & Luo, 2005; Super, Savickas & Super, 1996; Wilson, Harlow-Rosentraub, Manning, Simson, & Steele, 2007). This article discusses learning and volunteering in order to explore and better understand the range of learning experiences amongst older volunteers, aged 55 to 75,

inclusive. This topic is important for three reasons:

- 1) Understanding learning opportunities and goals is an important aspect of the volunteer resource management of older volunteers. Exploring this issue will assist volunteer resource managers with facilitating learning opportunities and actively creating spaces for learning. Furthermore, learning in volunteer roles may increase the volunteer recruitment, engagement and retention of older volunteers.
- 2) Recent research links mental health in the later years with mental stimulation and this seems to indicate the importance of learning for life as well as throughout life, over and above personal enjoyment, stimulation and engagement purposes.

3) In Canada, older adults contribute the most hours to nonprofit organizations compared to other age groups, both individually and as a group (Hall, Lasby, Ayer & Gibbons, 2009); hence, they are a critical human capital resource and their learning experiences must be better understood by volunteer resource managers.

## **Informal Learning and Volunteering**

Learning within the formal educational school system and continuing education through workplace training and development have been emphasized in the literature. There is, however, recognition that informal learning occurs all the time through life experiences, within different social contexts, including within nonprofit organizations and the broader community (Illeris, 2007; Livingstone, 2008, 2010; National Board of Education, 2000; Schugurensky, 2000; Wilson, Harlow-Rosentraub, Manning, Simson, & Steele, 2007).

Schugurensky (2000) classified informal learning along the dimensions of intention (or planning) and awareness (or consciousness). These dimensions reflect the effort which individuals put into their learning experiences at the time of their learning. There are three categories of informal learning that are based on these dimensions. Self-directed learning is intentional and conscious and is undertaken by an individual alone or as part of a group, without the assistance of an instructor. Incidental learning is conscious but not intentional. It occurs when there is no prior intention to learn something from an experience, but afterward it is clear that learning has taken place. Finally, socialization involves acquiring values, attitudes and behaviors through everyday life and this type of learning is unplanned and

unintentional. The two former types of learning were explored in this study.

Some researchers have begun to examine informal learning and volunteering (Livingstone, 2008; Schugurensky & Myers, 2003; Schugurenksy, Slade, & Luo, 2005); however, it remains a neglected area (Duguid, Slade, & Schugurensky, 2006; Livingstone, 2008; Schugurensky, 2000). One problem is that while adults are engaged in lifelong learning, including self-directed. collective (Livingstone), and incidental learning (Schugurensky), any unconscious and unplanned learning might be difficult to recall or to articulate (Schugurensky & Myers, 2003). Older adults have also not traditionally been the subject of such research investigations (Wilson et al., 2007); however, learning among older adults will become increasingly important because of recent research on mental health and the aging brain.

## Rationale: Volunteering and Health

Previous research has indicated that volunteering is associated with psychological, physical and cognitive health benefits for older adults (Fried et al., 2004; Kim & Pai, 2010; Schooler & Mulatu, 2001; Wilson, 2000). Lifelong learning through volunteering provides psychological benefits to retirees. It develops new interests and enhances social connections (Canadian Council on Learning, 2006), and this helps people feel happier.

Research also indicates that intellectually stimulating work and lifestyle activities can significantly decrease the risk of cognitive decline and dementia in old age (Karp et al., 2006; Kröger et al., 2008). The mental, physical and social components of activities may provide a protective factor against mental decline in old age. This finding means that a greater number of older adults will be seeking avenues for stimulation in order to stay active and mentally engaged,

and avoid dementias such as Alzheimer's disease. Volunteering can fulfill this need.

During retirement, volunteering may make up a large part of discretionary or leisure time, and may be a key method of providing mental, physical and social activity. Current socio-demographic trends combined with these recent findings on health benefits and volunteering suggest that learning may become an increasingly important aspect of volunteer engagement and retention (Wilson et al., 2007).

### Methodology

By examining the types of learning experienced by retirees who were engaged in volunteer activities, this paper presents some of the findings from a larger mixed methods study on volunteering during retirement (Cook, 2011; Cook & Gelfusa, 2009). There were two phases in this study. First, through a case study, semi-structured exploratory open-ended interviews were conducted with 12 retired male and female volunteers age 55 to 70 on their volunteer experiences. The interview sample was selected through snowball sampling on the basis of convenience (Collins, Onwuegbuzie, & Jiao, 2007). The case study was used to develop the phase 2 survey that further investigated the volunteer experiences of retirees, aged 55 to 75, with a broader sample. For the survey, the principal sampling frame was nonprofit organizations affiliated with a volunteer bureau that was part of Volunteer Canada. A few nonprofit organizations that might tend to attract older volunteers were also contacted such as the Diabetes Society, the Alzheimer's Society of Canada, Meals on Wheels, and the Canadian Cancer Society. Finally, to recruit additional survey participants, three retirees' associations (The Retired Teachers of Ontario, Nortel Retirees Association, and Region of Peel Alumni) were contacted. Three hundred and twenty-five emails were sent out to the

individuals who indicated an interest in the survey. In addition, paper copies of the survey were requested by six organizations and five seniors directly. A total of 56 paper copies were mailed out to those requesting them, and of these, 12 were completed. In total, 214 completed surveys were included in the analysis.

In the case study, several topics were explored, including learning. Participants were asked "What learning opportunities do you have through your volunteer activities?" in order to broadly understand older volunteers learning experiences. In the survey, participants were asked two Likert-type items to indicate their interest in learning new things and staying mentally active, and because the focus was on self-directed learning and they were also asked "What learning goals do you have through your volunteer work?" This more focused and specific question elicited a wider variety of learning examples.

## Characteristics of the Participants The Case Study

Five men and seven women were interviewed. They had retired within the last ten years and volunteered at least 3 hours per week. Three participants had retired from blue collar jobs and nine had retired from professional jobs. Their paid occupations were in the following industries: sales and service, health care, government services, automotive manufacturing, education, law and legal services, and information technology and computers. Some participants became re-employed after retirement meaning they still worked for pay, either occasionally or part-time. Table 1 provides details on each of the case study participants. All of the participants had some college or some university education. The majority of participants completed a formal educational program and obtained a college diploma or a university degree. The

participants were white and predominately middle class. They all lived in Southern Ontario and this facilitated travelling to conduct the interviews. The participants volunteered with a variety of nonprofit organizations, and most volunteered with more than one organization. These organizations can be categorized into social service, arts and cultural, educational, religious, political and environmental organizations and co-operative housing. *The Survey Participants* 

Table 2 contains demographic information for the survey participants. The participants retired in the last ten years and volunteered three hours or more per week. Fifty-seven percent were retired women; 43% were retired men. Participants were between the ages of 55 and 75, and the average age was 64. Almost a third of participants indicated that they were immigrants to Canada. Eight percent of survey participants identified themselves as members of diverse ethno-cultural groups.

The majority of the participants were either married or living common-law. Participants who were gradually retiring or had become re-employed were included in the analysis because of the trend to continue to bring in some kind of income after retirement (Castonguay, 2006). Seventy-two percent of participants were fully retired. Most participants volunteered at 3 organizations. The top five organizational types reported by participants were: social services (48%), community groups (31%), religious (30%), senior's groups (20%) or arts and culture organizations (19%).

As shown in Table 2, the participants have a high level of formal education. Participants also tended to have higher household incomes relative to Canadian norms; however, their incomes were only slightly higher than those of the volunteers age 55 and older in the Canadian Survey on Giving, Volunteering and Participating (Hall

et al., 2009). Eleven participants did not provide information on household income.

# **Results on Learning Opportunities and Learning Goals**

The case study participants were asked about opportunities for learning and they seemed to describe unintentional learning experiences; however, some excellent examples of incidental learning were described by the participants:

- Computers: that is a skill that I'm learning. (Participant 7; Female, Age 63).
- The annual conference: I love learning about it. Some of the things that I've learned, I just go "Wow, I didn't know that." The things you can learn. I am feeding my intellectual curiosity. I am learning things that fascinate me. (Participant 5; Male, Age 72).
- At this point in my life I'm learning a lot more than I ever thought . . . these last few years have really shown me a lot about seniors...they're wonderful people and they need to be more respected than they are.

  (Participant 1; Female, Age 63).

Volunteer training and orientation were mentioned by some of the case study participants. In discussing her very first experience volunteering with the crisis line, Participant 1 mentioned the training she received prior to becoming a volunteer in this role:

At the sexual assault centre, when I did the crisis line, we had to go for training, of course. I think when I first started with that, it was very stressful because you don't know who is going to phone, what they are going to say to you. And things like that. It was very stressful. After a few shifts, you kind of get in the feeling...But when I first started volunteering there, it was scary. (Participant 1; Female, Age 63).

The last example demonstrates how learning through volunteer experiences can be an on-going process, where it is difficult at first and skills develop and improve over time.

All the survey participants stated that they liked learning new things and 97% agreed that staying mentally active and engaged was important to them. Seventy-five percent of survey participants described a range of learning goals; the remaining 25% did not describe any goals. Some of the participants described very straightforward goals and others discussed more complex ones. Some participants engaged in formal education in order to accomplish their volunteer goals; however, most of the goals described were examples of informal self-directed learning:

- I am gaining a greater understanding of elderly people and their outlook on life; positive and negative. (Male, Age 66).
- I would like to become more heavily involved at a higher level in order to learn more about social justice issues. (Female, Age 57).
- Keeping abreast of new and improved technology that will help [me] or others on the 'team'.
   (Female, Age 59)

Some survey participants wanted to learn about the processes involved in accomplishing something or learn about the larger organization:

- I enjoy the physical activities of building houses, and the new knowledge of the process of how this actually takes place.... (Male, Age 68).
- Attending training sessions as required and an ongoing awareness of my community resources. (Male, Age 58).

• Understanding the 'mechanics' of the organization and how to rationalize and improve systems. (Male, Age 62).

Some participants' learning goals were centered on the clients they work with:

- Hospice work with the dying. I hope to bring comfort. (Female, Age 71).
- Helping people understand a new country and enable them to appreciate their new country Canada. (Female, Age 70).

A few participants described formal learning that they engaged in to fulfill their volunteer goals. This was the experience of this woman:

I am currently involved in something I never imagined doing – leading a choir of seniors (in their 50's to 80's). I am learning with and from them as I prepare each week and as we sing together. This year, I took a course in community choir leadership and continue to add knowledge, skills and repertoire. (Female, Age 66).

Some incidental learning was described because participants recognized that learning occurs even if they do not have specific learning goals. As one male participant, age 73 said: "You can always learn better people skills"

### **Discussion**

Both in the case study and in the survey, the participants indicated that they were engaged in learning through their volunteer roles. Learning experiences were classified into informal learning including self-directed and incidental learning, and formal education. In the case study, the open-ended question on learning opportunities generated a lot of examples of incidental learning. Volunteer training and orientation and ongoing skill and knowledge development were all mentioned.

In the survey, 75% of participants identified and described their learning goals.

They expressed a diverse range of goals involving learning skills and knowledge and learning about client populations and nonprofit organizations, structures and processes. The majority of these examples involved informal learning; however, a couple of participants recounted formal learning that involved taking college or university courses in order to obtain training for their volunteer activities. This shows the level of commitment of these older volunteers. Participants were able to describe incidental learning experiences, despite the fact that this type of learning is unintentional (Schugurensky & Myers, 2003).

Volunteers tend to be higher educated (Hall, Lasby, Ayer, & Gibbons, 2009), so it should not be surprising that they are interested in learning new things, like the participants in this study. Although not traditionally thought of as learners, older adults' interest in lifelong learning through volunteering is important to them. As older adults withdraw from paid work, learning experiences in other contexts may become more important. Volunteer-related learning took place within nonprofit organizations and the broader community, and these findings provide further support that these are rich sites of lifelong learning (Livingstone, 2008, 2010; Schugurensky & Myers, 2003).

This study has important implications for volunteer management, especially for focusing recruitment, placement and retention messages. As part of the process of recruitment, these findings can help volunteer managers understand why older people are coming to volunteer.

Volunteering needs to be seen as lifelong learning. Volunteer roles are opportunities to continue to learn. Older adults' interest in learning can be emphasized in recruitment messages. Key messages can be focused on boosting health, stimulating learning and

enhancing personal development through volunteering.

To enhance retention, volunteer roles need to have learning components articulating the learning objectives. Volunteers can then be matched based on their interests. Further learning opportunities can be identified by involving them in training and development programs. Volunteers should be given the opportunity to share their learning and communicate if their learning goals are met. If older adults are not learning things that interest them, they will become disengaged. Older volunteers are a rich labour pool and there are great benefits derived from learning how to better manage them. Providing multiple avenues for learning may help some nonprofit organizations to differentiate themselves and become places where older adults prefer to volunteer.

This study has generated additional questions that future research could address and volunteer managers can consider such as: 1) If older volunteers cannot find mentally stimulating volunteer roles, do they become an underutilized resource?; and 2) What are the best methods for helping to guide and manage informal self-directed learning goals?

### Conclusion

There is a lot of learning occurring through volunteering that is unrecognized. Overall, learning and cognitive stimulation are required throughout life and volunteer activities may be one of the key avenues that enable lifelong learning opportunities for older adults. Volunteer resource managers can help facilitate this by recognizing the unique learning that can occur, articulating this learning and actively encouraging lifelong learning through volunteering over and above volunteer training and orientation.

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#### **About the Author**

Suzanne L. Cook obtained her Ph.D. in Adult Education and Community Development at the Ontario Institute for Studies in Education, University of Toronto. Her dissertation is a synthesis of career development theory and volunteering during retirement. Her work is interdisciplinary, combining research and theory from the fields of adult education, volunteering, career counselling, nonprofit studies and gerontology. She continues to study older volunteers through her postdoctoral fellowship with the Baycrest Research About Volunteering in Older Adults project at Baycrest in Toronto.

Table 1
Participants and their Demographic Data

Participant Number and Basic Demographic Characteristics	Retirement and Volunteer Demographic Data
Participant 1: Female, Age 63, Married; B.Ed.	Retired 4 ½ years ago in 2003, High School Teacher; 3 Organizations, 9 to 10 hours per week.
Participant 2: Female, Age 67, Divorced; Some college	Retired 2 years ago in 2006, Health Care Aid; 4 Organizations, 10 hours per week.
Participant 3: Male, Age 57, Married; University degree	Retired six years ago in 2002, Automotive Inventory Technician; now self-employed; 1 Organization, 3 hours per week
Participant 4: Male, Age 55, Married	Retired 6 years ago in 2002, Automotive Sales; now security guard; 3 Organizations, 30 to 35 hours per week.
Participant 5: Male, Age 72, Married; University degree	Retired Lawyer, worked long hours; now self- employed; 3 Organizations, 3 hours per week.
Participant 6: Male, Age 62, Married; Master's degree, B.Ed.	Retired 4 ½ years ago in 2003, Retired Principal; 1 Organization, 35 hours per week.
Participant 7, Female, Age 63, Married; B.Ed.	Retired 6 ½ years ago in 2001, Assistant Daycare Supervisor; now supply teaching occasionally; 4 Organizations, 5 to 6 hours per week.
Participant 8: Female, Age 57, Single; University degree, B.Ed.	Retired 4 ½ years ago in 2003, Elementary School Teacher; 4 Organizations, 10 to 12 hours per week on average (40 hours per week during peak times).
Participant 9, Female Age 59, Married; University degree, B.Ed.	Retired 5 ½ years ago in 2002, Elementary School Teacher, 3 Organizations, 7 hours per week.
Participant 10: Female, Age 56, Married; University degree, College diploma	Retired 2 years ago in 2006, Chemical, Environmental, Health and Safety Technician; 1 Organization, 4 to 5 hours per week.
Participant 11: Male, Age 66, Divorced; University degree	Retired 1 year ago in 2007, Computer Programmer/Analyst; 5 Organizations, 13 to 14 hours per week.
Participant 12: Female, Age 60, Married; B.Ed.	Retired 5 years ago in 2002, Elementary School Teacher; 2 Organizations, 3 to 5 hours per week.

Table 2

Demographic Characteristics for Phase 2 Survey Participants and CSGVP 2007

	<b>Phase 2 Survey (</b> <i>N</i> = <b>214)</b>		CSGVP
Demographic Characteristic	Frequency	Percentage	(N = 3,247) Percentage
Sex			
Female	122	57.0	53.0
Male	92	43.0	47.0
Marital Status			
Married or Common Law	155	72.4	76.0
Separated	3	1.4	4.2
Divorced	23	10.7	4.3
Widowed	21	9.8	11.2
Single, Never Married	10	4.7	8.5
Retirement Status			
Fully Retired	154	71.6	
Semi-Retired	27	12.6	
Gradually Retiring	7	3.3	
Retired and Working	18	8.4	
Other	8	3.7	
Education Level			
Some High school	5	2.3	13.2
High school	14	6.5	15.8
Some Post-Secondary	26	12.1	5.8
Post-Secondary Diploma	29	13.6	37.6
University Degree	140	65.5	27.5
Previous Industry			
Business, Finance and Administration	28	13.1	
Natural and Applied Sciences, High Technology	9	4.2	
Health care and Health Services	37	17.3	
Education and Training	66	30.8	
Government Service and Social Service	4	1.9	

Table 2 (cont.)

Demographic Characteristics for Phase 2 Survey Participants and CSGVP 2007

	<b>Phase 2 Survey (</b> <i>N</i> = 214)		CSGVP (N = 3,247)
Demographic Characteristic	Frequency	Percentage	Percentage
Law and Legal Services	24	11.2	
Arts and Culture	2	.9	
Sales and service	11	5.1	
Construction	4	1.9	
Transportation	3	1.4	
Primary industries	1	.5	
Utilities	2	.9	
Processing and Manufacturing	5	2.3	
Trades, Installation, Maintenance and Equipment	7	3.3	
Other	10	4.7	
Household Income			
Under \$20,000	8	3.7	10.8
\$20,000 - \$29,999	12	5.6	25.8
\$30,000-\$39,999	25	11.7	25.8
\$40,000-\$49,999	16	7.5	21.7
\$50,000-\$59,999	26	12.1	
\$60,000-\$74,999	31	14.5	23.6
\$75,000-\$99,999	38	17.8	
\$100,000-\$124,999	22	10.3	18.3
\$125,000 or more	24	11.2	
Not stated	11	5.1	0.0

Source for CSGVP statistics: Statistics Canada. *Canada Survey of Giving, Volunteering and Participating, 2007.* [Data file and code book). Retrieved from http://sda.chass.utoronto.ca.myaccess.library.utoronto.ca/cgi-bin/sda/hsda?harcsda3+csgvp07mn