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Key Words: volunteers, personal finance, older adults, Cooperative Extension, Medicare Part D

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Key Words: volunteers, older adults, lifelong learning, retirement, volunteer resource management

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Key Words: senior volunteers, Baby-Boomers, Canadian Voluntary Sector

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Key Words: youth, baby-boomers, family volunteering, employer-supported volunteering

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The Green Thumbs, Healthy Joints program utilizes volunteers to help modify gardening activities using ergonomic tools and raised flower beds with the goal of increasing the involvement of older adults with joint pain. Health promotion programs, such as the Green Thumbs, Healthy Joints program, that facilitate physical activity for older adults with disabilities can be therapeutic, helping to lower the prevalence of risk factors such as cardiovascular disease, hypertension, obesity, and depression. This article assesses the characteristics of the Green Thumbs, Healthy Joints program, including its implementation at 23 different project sites. Volunteers built raised flower beds at each project site and older adult participants with joint pain used the flower beds to participate in gardening activities. Project sites that received a greater number of volunteer hours served a greater number of older adults. Neither the number of volunteer hours committed nor the number of older adults served were related to project sites' budget requests or project site type ("community" vs. "assisted living"). This suggests that the number of older adults participating in the Green Thumbs, Healthy Joints program is primarily related to the number of volunteer hours each project site receives, and that the program may be implemented in a variety of sites.

Key Words: older adults, volunteer, program evaluation

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(Editor-generated) Key Words: ombudsman, long term care, volunteer attrition

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Donna J. Rabiner, Ph.D., Scott Scheffler, Elizabeth Koetse, Jennifer Palermo, Elizabeth Ponzi, Sandra Burt, & Lynelle Hampton

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(Editor-generated) Key Words: home health care, Senior Companion Program, RTI, later life satisfaction

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(Editor-generated) Key Words: foster grandparent, later life satisfaction, volunteers

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Baby boomers want and expect more from their volunteer experience. They are eternal optimists about the future, exude a "we can do anything" spirit, are individualistic in their personal pursuits, openly question authority and are reformers. Baby boomers are redefining the meaning of retirement and volunteer service. Organizations must now compete with each other to attract and retain a better-educated, diverse and outcome-focused baby boomer generation. Attracting and retaining baby boomers as volunteers will require organizations to redefine and reframe their message. The internal operational paradigm of service must be refocused to include the transference of knowledge from the workplace to meaningful community service, provide a role for decision-making within the organization and generate flexible meaningful roles that facilitate personal growth and service learning. The University of Maryland Center on Aging in collaboration with the Corporation for National and Community Service and AARP (formerly known as the American Association of Retired People) facilitated the development of several national demonstration models to determine the best practices in recruiting and retaining baby boomers as volunteers, including The Leadership Institute for Active Acting, a service learning model implemented in West Palm Beach, Florida through the area Agency on Aging of Palm Beach/Treasure Coast, Inc. The history, conceptual thinking, curriculum and program administration approaches are detailed along with outcome measurements.

(Editor generated) Key Words: Baby Boomers, volunteering in later life, AARP, volunteer recruitment and retention

In This Issue:
Age as Opportunity

*For age is opportunity no less
Than youth itself, though in another dress,
And as the evening twilight fades away
The sky is filled with stars, invisible by day.*

Henry Wadsworth Longfellow

I have always loved this simple poem by Longfellow. I originally came across it way back in 1990 when I used it in my undergraduate leadership class at Ohio State to help emphasize the point that one must actively seek opportunities to lead. Like the stars during the daytime, those leadership opportunities are there, but it just takes more effort to see them.

So it is with age, opportunity, and volunteerism. As a society, we no longer think of retirement as a time to sit in a rocking chair on the front porch watching and waiting for time to pass. Rather, individuals over the age of 65 (“the elderly”, “senior Americans”, “the gray revolution”, etc.) are reinventing and reinvigorating themselves in retirement through second careers, forging new life directions targeted toward issues and causes that are meaningful to them, often as volunteers. As I begin the third year of the second half-century of my life, I am developing a new perspective of and appreciation for the concept of “elderly.” Safrit men tend to live full, long lives (my Dad just celebrated his 93rd birthday) and I only have another few years before retirement becomes an option for me. I am certain that my “elderly years” will evolve as a dynamic combination of paid and volunteer work, and eventually, I too will probably be the recipient of the selfless efforts of volunteers aiding me in my “twilight years”.

This issue of *The International Journal Of Volunteer Administration* approaches volunteerism from two distinctly different perspectives, first, volunteerism targeted to the elderly, and second, engaging the elderly as volunteers. The issue opens with four excellent *Feature Articles*. Carolyn Bird describes the impacts of a program that engages volunteers to help older adults enrolled in Medicare Part D prescription drug programs, or SHIIP (Seniors’ Health Insurance Program). According to the author, “The SHIIP program illustrates how volunteers may be engaged to deliver a complex program to older adults, annually saving sponsoring agencies and program clientele thousands of dollars individually and resulting in multi-million dollar statewide impact”. Suzanne Cook explores volunteerism as a medium for learning during retirement. She discusses important opportunities for volunteer resource managers to bridge volunteerism with lifelong learning in older adults, with important implications for volunteer engagement and retention. Lonneke Roza, Anke Becker, Eva van Baren, and Lucas Meijs approach the concept of volunteering by the elderly as “productive aging”. They conclude that “Older volunteers can offer unique assets to organizations and society through their knowledge and expertise.” Finally, Paula Speevak Sladowski discusses how volunteer organizations can prepare themselves to better engage baby boomers now and be prepared to retain them in volunteerism into their senior adult years. According to the author, “The evolving landscape in the non-profit and voluntary sector and the shifts in the public policy environment add to the complexity that volunteer

organizations are facing. . . . With each generation of senior volunteers, a higher percentage is volunteering but they volunteer fewer hours per year and are often seeking shorter-term volunteer opportunities.” She also offers an excellent *Tools of the Trade* sharing valuable insights gained through a national research study of trends in volunteer resource management in Canada, focusing upon youth, families, baby boomers, and employee-supported volunteers.

Leo Schlosnagle, Tara Karns, and JoNell Strough present an *Ideas That Work* describing the innovative Green Thumbs, Health Joints program that utilizes volunteers to help modify gardening activities using ergonomic tools and raised flower beds with the goal of increasing the involvement of older adults with joint pain. They conclude that “Health promotion programs . . . that facilitate physical activity for older adults with disabilities can be therapeutic.”

From the Annals includes four articles published previously in *The Journal of Volunteer Administration*, all relating directly to the current issue’s focus. “Volunteer Attrition: Lessons Learned from Oregon’s Long-Term Care Ombudsman” by Wayne Nelson, Ellen Netting, Kevin Borders, and Ruth Huber was first published in 2004. “The Impact of the Senior Companion Program on Quality of Life Outcomes for Frail Older Adults” by Donna Rabiner, Scott Scheffler, Elizabeth Koetse, Jennifer Palermo, Elizabeth Ponzi, Sandra Burt, and Lynelle Hampton was published in 2003, while “Serving and Keeping Those Who Serve: Foster Grandparents and Their Own Family Needs” was first published in 1998. The issue closes with “The Leadership Institute for Active Aging: A Volunteer Recruitment and Retention Model” authored by Laura Wilson, Jack Steele, Estina Thompson, and Cathy D’heron and first published in 2002.

I join the entire Editorial Board and Reviewers of *The International Journal of Volunteer Administration* in sharing this issue so that we may all continue to seek for those hard-to-see opportunities offered by and through volunteerism during the twilight years of our lives. I invite and encourage you to come join me in getting up out of the rocking chair and instead rocking the world as a volunteer



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The Economic Impact of Extension Educators and SHIIP Volunteers

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Abstract

Program managers are frequently challenged to deliver services to their stakeholders in an environment of static or diminishing resources. This may be particularly true during The Great Recession of 2007 to 2009 (NBER, 2010). This paper focuses on the economic benefit to older adults as North Carolina Cooperative Extension (NCCE) and North Carolina Seniors' Health Insurance Program (SHIIP) partner to provide a structured framework through which volunteers annually deliver financial savings to older adults enrolling in Medicare Part D prescription drug plans. The SHIIP program illustrates how volunteers may be engaged to deliver a complex program to older adults, annually saving sponsoring agencies and program clientele thousand of dollars individually and resulting in multi-million dollar statewide impact. Using data from the NC Cooperative Extension Reporting System the study examines success stories provided in 2009 by Family and Consumer Sciences agents documenting their work in Family Financial Management. Selected reports demonstrate quantitative and qualitative value created through FCS agents' integration of the Cooperative Extension mission, volunteer resource management, and their SHIIP coordinator roles. A discussion of volunteer selection and education reveals valuable information about preferred volunteer attributes and skills. An examination of partnership benefits highlight organizational partnership synergies, and the quantitative and qualitative impacts of volunteer resource management.

Keywords:

volunteers, personal finance, older adults, Cooperative Extension, Medicare Part D

Introduction

As the country experienced the greatest economic downturn in decades and perhaps since the Great Depression, the 18-month recession of December 2007 to June 2009 (National Bureau of Economic Research, 2010) is notable for its depth and reach, affecting nearly every sector and demographic group. Some might think that older adults who are retired have not been impacted directly by the massive job losses. However, other economic factors in the downturn have had serious impact on older adults, including unexpected rises in

healthcare and prescription drug costs. In an environment in which many would-be volunteers may be facing economic difficulties of their own, it seems particularly important to examine the health and vitality of volunteer programs and their economic impact. In this paper, we demonstrate how a volunteer program of counseling and outreach can help older adults, who live primarily on fixed incomes, save substantial amounts of money. This article discusses the partnership of North Carolina Cooperative Extension and the North Carolina Seniors' Health Insurance

Information Program. In many North Carolina counties, North Carolina Cooperative Extension Family and Consumer Sciences educators (also known as agents) and SHIIP-trained volunteers offer educational services that help support decision-making on such issues as selecting a Medicare Part D prescription drug plan. These services have been shown to have measurable economic benefits for older adults, and can potentially reduce financial pressures on extended families that provide financial support to elders (Family Caregiver Alliance, 2003; Women's Institute for a Secure Retirement, n.d.).

Background

The North Carolina Seniors' Health Insurance Information Program (SHIIP) was created in 1986 by the late North Carolina Insurance Commissioner Jim Long. The State Health Insurance Program "(SHIP) (formerly the Information, Counseling and Assistance (ICA) Grants Program) was created under Section 4360 of the Omnibus Budget Reconciliation Act (OBRA) of 1990 (Public Law 101-508). This Act authorizes the Centers for Medicare and Medicaid Services (CMS), the Federal Medicare agency, to make grants to states for health advisory services programs for people with Medicare. Currently, there are SHIPs in all 50 states plus Washington, D.C., Guam, Puerto Rico and the Virgin Islands" (U.S. Department of Health & Human Services, Centers for Medicare and Medicaid Services, 2010, ¶ 1). In North Carolina, SHIIP has become the link between older adults and information about their health insurance (SHIIP, n.d.). SHIIP maintains 110 county-based offices in 100 counties and the Cherokee Reservation and actively solicits volunteers through the North Carolina Department of Insurance website and SHIIP center staff. SHIIP counseling centers are frequently co-located with

another community agency such as offices of county departments of aging, senior centers, and North Carolina Cooperative Extension Centers.

The existing human service agency, such as Area Agency on Aging, Senior Center, or in this case North Carolina Cooperative Extension, provides SHIIP a staff person who serves as County Coordinator and a local office for citizens to call and visit when they need health insurance help and assistance. In addition the Coordinator assists SHIIP in recruitment, training and retention of SHIIP volunteer counselors in the county. These volunteers work with the local agency to counsel clients and are required to document and record all counseling sessions. The size of the volunteer group varies by county and it is the responsibility of SHIIP to make sure there are adequate resources based on the demand for the services. An average size county center would consist of a Coordinator and approximately 7-10 volunteers.

This article focuses specifically on the SHIIP programs operated through Cooperative Extension by Family and Consumer Sciences (FCS) agents who, as part of their plan of work, act also as SHIIP Coordinators. In order to expand their capacity to serve the residents of their county, FCS agents engage in volunteer resource management. Through partnership, FCS agents and volunteers annually deliver financial savings to North Carolina citizens in the form of reduced out-of-pocket prescription drug expenses.

Medicare offers prescription drug coverage to everyone enrolled in Medicare. To join a Medicare "Part D" Prescription Drug Plan, you must have Medicare Part A or Part B and live in the service area of the Medicare drug plan you want to join (U. S. Department of Health and Human Services, Centers for Medicare and Medicaid

Services, n.d.). The Medicare Part D prescription drug assistance plan is a complex program. Theoretically, North Carolina citizens could independently review and select their Medicare Part D prescription plan. However, the complexity of the program necessitates assistance for most older adults. Drug plans offered change every year, invoking a plan review even when the older adult's formularies have not changed. Prescription drug plan changes can be made during open enrollment, offered annually between November 15 and December 31 as prescribed in the Medicare Modernization Act of 2003 and implemented through the Centers for Medicare and Medicaid Services. However, beginning in 2011 the open enrollment period will be held October 15 to December 7 (45 days excluding Sundays).

During the Federally defined 45-day open enrollment period, older adults are compelled to comparison shop across the 33 plans offered to North Carolinians to locate the most cost effective plan for their particular combination of prescription medicine. Selecting a prescription drug plan requires the use of technology to access the website and patience to compare several drug plan options. Selecting the most cost-effective plan is particularly important in 2010 considering that the Social Security Income benefit is a primary source of income for nearly half of all retired households and, for the first time since 1975, the Social Security 2010 benefit payments did not have a Cost of Living Adjustment. The combination of rising medical costs and constrained income may serve to compound financial stress and decrease quality of life among older adults.

As organizations respond to economic pressures, the prevailing trend has been to operate lean or minimally staffed organizations; all organization types from

non-profit, for profit and state governments have been affected. At a time when individuals and families are increasingly facing financial duress, state agencies themselves must operate on reduced budgets and may be less than optimally staffed. As a result, volunteers and volunteer resource management has increasingly become an important part of mission execution (Rehnborg, 2007).

While volunteer contributions typically add value to the community, the economic impact of their contributions on the lives of North Carolinians warrants examination during this period of widespread/national economic distress. Volunteer activities are most effective when a structured framework exists to shape volunteer intent and energy into activities that produces value (Rehnborg, 2007) for some segment of society. Just as steam, gas, and water needs to be channeled to create productive power, volunteer efforts produce great value through frameworks that support and direct volunteer efforts to meet needs. For example, Rehnborg's study of 20 state agencies in Texas found that eight agencies with well developed formal volunteer resource management systems accounted for 81% of volunteer activity among the agencies.

The Situation

Older adults' medical expenses represent a large portion of their annual expenses. As medical expenses increase, less income is available to meet other essential needs such as food, utilities, and housing costs. Some reports consider that the economic downturn has had less effect on older adults because most are no longer engaged in the labor market and most are already operating on streamlined budgets (Cawthorne, 2010). Yet other aspects of the economic downturn has had a significant impact on older adults' financial position, including the stock

market turbulence (Twinn, 2009) and the crash of 2008, the eight trading days in October which saw the Dow Jones Industrial Average drop a total of 2,399.47 points or 22.11% decrease in value (Moneyzine.com, 2008) wreaking havoc on personal investment and retirement account values. So even while unemployment was not a concern, shrinking assets may be more critical as older adults are unlikely to have the opportunity to recover from market losses. In addition, since there was not a Social Security Cost of Living Adjustment (COLA) in 2010, the starting point for the measuring period for the 2011 COLA will look back to the third calendar quarter of 2008 (Social Security Administration, 2009).

That the 2009 stimulus act included \$100 million for senior nutrition programs suggests widespread knowledge of the economic hardships older adults were and are facing (National Council On Aging, 2010). The erosion of traditional pension programs where the retirement income benefit is defined by a formula utilizing salary and number of years worked contributes to a more tenuous financial status that fluctuates with the stock market. The Medicare Part D program is one way to re-introduce an element of financial stability by defraying the costs of necessary prescription drug purchases.

The SHIIP Program

Extension agents have established North Carolina Cooperative Extension as a high visibility local resource for Medicare Part D program assistance. Agents with their extensive local networks, skills in consumer education and central locations have been effective in assisting older adults and enrolling them in Medicare benefit programs. Moreover, agents extended their community reach by recruiting, training, and developing volunteer networks specifically

for the purpose of conducting Seniors' Health Insurance Information Programs (SHIIP). The Medicare Part D program bears similarities to and differences from the Volunteer Income Tax Assistance (VITA) Program, a program that trains volunteers to prepare income tax returns for low- and moderate-income individuals at no cost to the individual. Both programs involve specialized program knowledge that necessitates volunteer training, have a potential financial impact for the citizens being assisted by the volunteers, and have formalized training programs required of volunteers. VITA is dissimilar in that it is designed as an all-volunteer program and its ultimate success depends on the number of volunteers who meet annual certification requirements (Madison, Ward, & Royalty, 2008). The SHIIP program refined its training process streamlining the educational content to target essential concepts and thereby reduced the barrier to volunteering that is currently experienced by VITA programs. Well-defined roles and a clear understanding of volunteer tasks supported SHIIP's ability to create effective training appropriate for the volunteer role (Hart, 2005) while improving the volunteer's training experience.

Volunteer Impacts

Using data from the North Carolina Cooperative Extension Reporting System, we have been able to retrieve and review success stories provided in 2009 by Family and Consumer Sciences agents documenting their work in the Family Financial Management Skills category.

Selected reports demonstrate qualitative and quantitative value created through FCS agents' integration of the Cooperative Extension mission with their SHIIP coordinator roles. Some accomplishments include:

Reduced out-of-pocket expenses

The Medicare Part D enrollment or drug plan selection process requires individual consultation with each older adult to compare his or her particular combination of formularies against the drug plans offered. In County A, five volunteers assisted in counseling 398 families of which 95% saved at least \$300 for a total savings of \$113,400.

Extending audience-reach

In County B, SHIP volunteer counselors assisted 62 applicants with the on-line Low-Income Subsidy (LIS) Program applications. The LIS represents a significant benefit for income-qualifying older adults as it reduces prescription drug premiums and deductibles by 25% to 100%. Volunteers assisted older adults in accessing programs for economic benefit by employing their program knowledge and bridging the technology gap. In several other counties, FCS agents and volunteers incorporated SHIP information programs into health fairs to reach approximately 1,700 older adults in non-office type settings. As a result, older adults not participating in the Medicare Part D program benefit through the health promotion events conducted in association with the annual enrollment period.

Going the “extra mile”

While well-trained volunteers assist clients with routine prescription drug plan selection, FCS agents have an improved capacity to investigate special situations and act as advocates. Extension agents helped individuals who were in dire financial need and found the process of advocating for themselves within organization structures challenging. Agents navigated the systems of the North Carolina Department of Social Services, the Social Security Administration, insurance companies, and employers on behalf of older adults. For example, a cancer patient and his wife did not have Medicare Part B (physician coverage) or Part D drug coverage. As a result of the

agent’s efforts, the couple received the “extra help” Low Income Subsidy program and the Social Security Administration was induced to evaluate for Medicare Part B reinstatement. In another case, an insurance salesperson had sold a policy to a man who could not read and write; he was not aware of what he was purchasing. Moreover, the agent’s investigation revealed that the man should not have paid any insurance premiums due to his status as eligible for both Medicare Part D and the Low Income Subsidy program. The agent secured the refund of the \$1000 paid in premiums through accessing the insurance company’s appeals process. SHIP volunteers enabled the FCS agent to devote extra time to assist clients with unique needs and resolve special situations without sacrificing enrollment support to older adults to complete standard enrollment. This example illustrates how capable volunteers increase capacity to assist clients with routine and unique needs.

Volunteer Selection and Education for Program Success

Persons who work with the SHIP program must possess the willingness and desire to assist persons in the community on Medicare and other health related issues. They must have excellent communication skills in addition to experience in counseling. The SHIP offers training on the technical information as well as sensitivity and awareness training to assist volunteers in helping persons with disabilities or limitations due to age or medical condition. The volunteers must possess good computer skills and be responsible to participate in required reporting and continuing education. Lastly a commitment of time is very important depending on the number of volunteers in the county and the demands on the program.

Partnership Benefits

The complementary relationship enhanced both organizations' mission execution. North Carolina Cooperative Extension's partnership with SHIIP expanded or deepened Family and Consumer Sciences agents' local partnerships linking them more closely with colleagues at the Offices on Aging, Social Security Administration and Department of Social Services. The services rendered to the Medicare Part D beneficiaries contributes to a heightened awareness of Extension to a much broader audience in the county. SHIIP's partnership with Cooperative Extension as one of its major partners allowed it to benefit from Family and Consumer Sciences agents' knowledge of the local landscape and their connections to local organizations and events which promote expanded avenues to discuss SHIIP and the services provided on local levels.

In summary, the partnership between North Carolina Cooperative Extension and the North Carolina Seniors' Health Insurance Program provides a framework that contributes to community capacity building through human capital investments made through volunteer training and formal volunteer programs. Both organizations benefit through enhancements to their mission execution and community residents' lives are enhanced through the efficient delivery of services incorporating volunteer resource management and volunteer resources. As a result, between November 15 and December 31, 2009, Extension Agents and their SHIIP-trained volunteers enrolled 1,934 Medicare beneficiaries in one of the 33 Medicare Part D prescription drug plans.

North Carolinians experienced a one-year savings in prescription drug costs of approximately \$2,022,000. Further, agents and volunteers leveraged the heightened awareness associated with the Medicare Part

D enrollment period to conduct health promotion events to reach a total of 2,683 North Carolina older adults over the 45-day period. The Agents and volunteers helped enrollees effect annual savings ranging from \$300 to \$23,000 in prescription costs. One county reports a North Carolina Department of Insurance estimated average annual savings of \$2000 per enrollee.

Limitations

It must be noted that both the North Carolina Cooperative Extension and the North Carolina Department of Insurance's SHIIP, are state agencies and this fact may have served to promote the success of the relationships. While no evidence was found to suggest this was the case for the partnership discussed in this paper, volunteer resource managers may need to consider whether varied organizational structures may influence partnership success.

Conclusion

Agencies seeking to expand their capacity to reach and serve their audiences in traditional (office-settings) and non-traditional (community events) settings may benefit through a volunteer resource management program similar to the model presented here. Employing well-trained volunteers not only supports serving a greater number of clients, it also creates space for program primary staff to provide non-routine assistance to clients with special situations. Quantifying the economic benefit to state residents can easily be accomplished for economic assistance programs. Equally important is to capture quality of life improvements through documenting situations where interventions mitigated potential family hardships that may have resulted through benefit denials or distortions of program access.

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About the Author

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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 on-going 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; Schugurensky, 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 on-going 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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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

Demographic Characteristic	Phase 2 Survey (N = 214)		CSGVP (N = 3,247)
	Frequency	Percentage	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	4.3
Divorced	23	10.7	
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

Demographic Characteristic	Phase 2 Survey (N = 214)		CSGVP (N = 3,247)
	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	
\$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
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**The “Why” of Older Volunteers: Do Employment and Loss of Spouse Influence
the Motivation of Older Volunteers?**

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Abstract

Volunteering by the elderly can be seen as productive aging. Older volunteers can offer unique assets to organizations and society through their knowledge and expertise. Volunteer resource managers and volunteer program administrators widely acknowledge this valuable pool of volunteers. Recruiting and retaining these volunteers requires knowledge about their reasons for volunteering. In other words, what motivates older people to volunteer? This European-based study suggests strong similarities in the motivation of older volunteers from Europe and North America and two interesting moderators in the motivation of older volunteers: 1) employment/retirement and 2) loss of spouse. Given the similarities between their motivational patterns, the results have implications for the recruitment and retention of older volunteers on both continents.

Key Words:

motivation, older, volunteers, Volunteer Function Inventory

Introduction

Many older people (50+) have accumulated a lifetime of skills and knowledge that could enrich their lives after retirement (Musick & Wilson, 2008). One possibility is through volunteering. Volunteering by older people is often

considered in terms of increases in the number of volunteering hours, given the less demanding schedules of retired people. Bass and Caro (2001, p. 40) describe volunteering by older people as a form of productive aging, as it “produces socially valued goods

and services or that develops the capacity to produce those goods and services.”

One cannot assume that retirees and older people will take up volunteering. A “life of leisure” (Moen, Fields, Meador, & Rosenblatt, 2000, p. 249) is apparently an important element in the current ideal retirement life-style. Although the potential for volunteering after retirement is high, it does not always occur in practice. Musick and Wilson (2008) found that older people become less likely to volunteer and that they volunteer for fewer organizations, although they are likely to increase the time they contribute to each organization.

As volunteers age, life experiences (Safrit, Scheer, & King, 2001) can lead to changes in their motivation to volunteer. The literature is inconsistent with regard to the definition of the “older volunteer.” This study defines “older volunteers” as above the age of 55, with those older than 65 considered as “retirees,” consistent with the most common age for retirement in the Netherlands.

This article makes three contributions to the current literature. First, it adds a European perspective to the extensive body of Anglo-Saxon research on the motivation to volunteer, with a particular focus on older volunteers. Second, it addresses the knowledge gap identified by Petriwskyj and Warburton (2007) regarding older volunteers, despite their importance for volunteer program administrators and volunteer resource managers. Third, this research considers two possible moderators with regard to the motivation of older volunteers: 1) loss of spouse and 2) employment (as opposed to retirement). Several studies have examined the association between loss of spouse and informal social interaction and other forms of social engagement (Brown, House, Brown, & Smith, 2006; Umberson, Wartman, & Kessler, 1992). Far less

attention has been specifically focused on volunteer participation (Utz, Carr, Nesse, & Wortman 2002). There is no historical evidence that retirement is associated with higher rates of volunteering (Caro & Bass, 1997) or that it affects the motivation to volunteer.

This study presents the motives of older volunteers within a European context, identifying moderators that could influence their motivation. These results are used to derive implications for recruitment and retention strategies.

Motivation to Volunteer

Recruiting new volunteers and retaining their commitment requires an understanding of why people volunteer. Existing approaches to the study of volunteer motivation include the volunteer process model (Otomo & Snyder, 2002), the role/identity model (Grube & Piliavin, 2000), the psychological contract approach (Liao-Troth, 2005), and the functional approach (Clary et al., 1998). This article is based primarily on the functional approach, which identifies personal and social functions that can be served by volunteering: values, understanding, social, career, protective, and enhancement. This model assumes that all people have the same basic psychological needs (see Table 1).

Many studies have indicated that there are various factors motivating older people to volunteer. Most research on motivation (and specifically on older volunteers) has been conducted in North America. Musick and Wilson (2008) implied that older volunteers are more motivated by religious beliefs and values and by the desire to remain busy and productive, to maintain faculties and skills, and to feel needed by others. Retired volunteers (65+) mention the desire to stay busy, healthy, and active as primary reasons for volunteering (Ilsley, 1990; Lee & Burden, 1991; O'Reilly &

Caro, 1994). The findings of Musick and Wilson are largely consistent with those of Okun, Barr, and Hertzog (1998), who administered the Volunteer Function Inventory (VFI) to a sample of active volunteers above the age of 50 and found that they were most likely to be motivated by Values, Understanding, and Enhancement. Older volunteers thus seek to help others, learn about themselves and the world in which they live, and feel useful and good about themselves. Few mention the need to alleviate loneliness (Moen et al., 2000). Retired people do not necessarily feel a lack of friends or social contacts. In fact, older people who volunteer are just as likely as young people are to start volunteering in order to establish new social contacts (Musick & Wilson).

From an organizational point of view, it is important to know which motives should be addressed in order to attract the right people for specific volunteer assignments (Musick & Wilson, 2008). Only if a volunteer's motivation, capabilities, and expectations match the job description will it be possible to maintain (or increase) loyalty and commitment. Volunteer satisfaction and retention are also related to motivation, as human behavior is motivated by certain goals and needs (Finkelstein, 2007; Karr & Meijs, 2006). Research suggests that the recruitment and retention of older volunteers requires respect for their expertise and capabilities (Nagchoudhuri, Moore McBride, Thirupathy, Morrow-Howell, & Tang, 2005; Okun et al., 1998).

Moderating the Motivation of Older Volunteers

This article specifically considers two potential moderators for the motivation of older volunteers. The first involves the loss of spouse, whether by divorce or death. The few studies to examine the relationship between loss of spouse and volunteering

show that, although volunteer participation may mitigate the negative impact of widowhood on personal well-being, those who have recently lost a spouse are unlikely to change their volunteering behavior (Utz et al., 2002; Wheaton, 1985). Musick and Wilson (2008) mentioned several theories that may predict the impact of volunteering on people's lives following such a loss. Role loss theory (Chambré, 1984) predicted that married people who experience the death of a spouse seek ways to replace the marital role in their lives, possibly by volunteering. Activity theory (Lemon, Bengtson, & Peterson, 1972) argues that, as social roles become less available, people replace lost roles with new ones in order to preserve their self-identity. Disengagement theory (Achenbaum & Bengtson, 1994) proposes that older people disengage from social activities as they lose roles. Continuity theory (Atchley, 1989) argues that, in old age, people tend to continue whatever level of activity they enjoyed in middle age. Although these theories could explain changes in the motivation of older volunteers, less is known about the influence of widowhood on motivation. Musick and Wilson (2008) further argued that the results of the few studies conducted on this subject are not representative enough to predict the consequences of spousal loss on volunteering.

The second moderator involves the transition from employment to retirement. Research on older volunteers and the effect of employment or retirement has focused on the likelihood of volunteering and the number of hours contributed (Broese van Groenou & Van Tilburg, 2010; Caro & Bass, 1997; Choi, 2003). Musick and Wilson (2008) argued that employed people are generally more likely to volunteer, although they make no statement about the possible moderating effect of employment and retirement on the motivation to volunteer.

Few studies have linked the motivation to volunteer to life-stage changes concerning employment and retirement for older volunteers. This relationship is analyzed further in the following sections.

Methodology

Musick and Wilson (2008, p. 56) stated that “the best-known and most sophisticated psychological theory of volunteer motivations takes on the functional approach [...] which is concerned with the reasons and purposes that underlie and generate beliefs and actions.” The well-known Volunteer Functions Inventory (VFI), which is based on this approach (Clary et al., 1998), was used in this study. The VFI has been validated, applied, and adapted in various studies in different countries and contexts (Okun et al., 1998; Greenslade & White, 2005). The VFI assesses each of the six functions as primary motives for volunteering (Clary et al., 1998). The inventory comprises five items for each motivational function. Each item consists of a proposition that can be ranked on a Likert scale from 1 (“not at all important”) to 7 (“extremely important”).

The research sample was homogeneous, consisting of Dutch respondents within the same age group (55+) and similar social-economic status. All were volunteering for the same organization and performing one of three types of tasks. This allowed the analysis of relationships between personal characteristics and motivation to volunteer. Multivariate analysis was conducted with SPSS. Because the VFI has been validated multiple times (Clary et al., 1998), no factor or reliability analyses were conducted.

Data collection, which was part of the master’s thesis research of the second author, was conducted within the national association De Zonnebloem, one of the largest volunteer organizations in the Netherlands. De Zonnebloem has about

41,000 volunteers, organized in 1200 local chapters in 550 municipalities. Their main activities involve visiting and providing activities for people with physical disabilities due to illness, handicap, or age (see www.zonnebloem.nl).

The online survey was distributed through an e-mail link in order to reach a large and geographically dispersed sample, as well as to reduce costs and save time (Couper, 2001). The questionnaire was sent to all 4,830 volunteers above the age of 50 from whom the email address was known. The questionnaire was returned by 1,484 (31%) respondents, 1,289 (27%) of which were complete.

Results

All respondents were 55 years of age or older. The average age for the sample was 63 years. Most of the respondents (72.5%) were female. The average time spent volunteering was 16.32 hours per month. This is consistent with the average hours per volunteer in the Netherlands (CBS, 2009). The majority of the respondents (77%) were Christian, with Roman Catholics as the largest group (56.8%). Most of the respondents were active churchgoers, with 34.5% attending services at least once a month. Only 27.9% indicated that they never go to church. The majority (49.7%) had completed only secondary school, while 22.3% had completed advanced vocational degrees, and 28% had completed university or professional degrees. About one fourth (23.2%) of the respondents were employed, and 76.8% were retired. A large majority of respondents (78.9%) were married, while 4.8% were divorced, 9.5% were widowed, 3.5% were cohabiting, and 3.3% were single.

The results (see Table 2) indicate that, in general, the respondents were motivated by Values (5.76), Enhancement (4.24), and Understanding (4.68). The Social (3.02),

Protective (2.99), and Career (2.27) functions appeared less important as reasons for volunteering. This corresponds to the three most important motivations of older volunteers in North America (Musick & Wilson, 2008).

The Effect of Employment and Loss of Spouse

As observed above, the motivations of older volunteers in Europe are similar to those of older volunteers in North America, although few studies have investigated on moderators that can influence motivation. We analyzed the effects of being employed or retired and loss of spouse on the motivation to volunteer. First, we constructed a correlation matrix to examine relationships between the variables. Employment is negatively correlated with the Career ($P<0.01$), Enhancement ($P<0.05$), and Understanding ($P<0.01$) functions. Loss of spouse is positively correlated with the Protective ($P<0.01$) function. There is no significant correlation between loss of spouse and employment. Multivariate analysis for the dependent variables seem not to be appropriate since the correlation between the dependent variables is low. The interaction between the independent variables was not considered in further analyses.

The results of the multivariate analysis show that employed people had significantly higher scores than retirees did on the Career ($df=1$; $F=39.260$; $P<0.01$; $R^2=0.053$) and Understanding ($df=1$; $F=8.118$; $P<0.01$; $R^2=0.013$) functions. The R^2 indicates that the Employment function has a stronger influence on the Career function than it does on the Understanding function (Table 3).

Results from the analysis show that people who had experienced the loss of a spouse (whether through divorce or death) scored significantly higher than other

respondents did on the Protective function ($df=1$; $F=18.788$; $P<0.01$; $R^2=0.021$). People who had experienced the loss of a spouse scored significantly higher (3.41) than did respondents who were still married (2.92; see Table 4).

Discussion

Consistent with the findings of Musick and Wilson (2008) concerning older volunteers in North America, this European sample scored high on Values, Understanding, and Enhancement (see also Okun et al., 1998). This suggests that the literature and general findings are applicable across multiple countries and contexts. Our findings provide more detail concerning two specific moderators: employment (vs. retirement) and loss of spouse. The data indicate that these moderators influence the functional motivation of older volunteers, although there is no interaction between the two.

First, employed people are slightly more motivated by career-related experience when they volunteer, even if they are older than 55. This outcome is surprising, given that most people in this age group are nearing retirement age. Strong incentives to develop or invest in their careers would seem less relevant for this group. In comparison to those who are retired, older volunteers who are employed are also more likely to seek opportunities to expand their knowledge about the world and to exercise infrequently applied skills. Pre-retirement volunteering seems to be driven by the motivation to express knowledge, skills, and expertise while learning more about the world.

Second, our results show that the loss of a spouse (whether through divorce or death) affects the motivation of older volunteers. Older volunteers who have lost a spouse scored higher on the Protective function. This suggests that volunteering offers a

significant opportunity to reduce negative feelings and address personal problems following the loss of a spouse, although the absolute values of the scores are not very high for either group (2.92 and 3.42, respectively). Musick and Wilson (2008) argued that more factors should be considered when analyzing the relationship between volunteering and the loss of a spouse. The other factors they suggest include the age at which the loss was experienced, the volunteer activity of the former spouse, the type of volunteering and, most likely, the nature of the marital relationship. Although our data do not allow the consideration of these factors into account, these factors might explain the absence of substantial absolute differences between the two groups.

Conclusions and Implications for the Profession

Older volunteers can be a very productive group, as they can produce or develop capacity for socially valued goods and services (Bass & Caro, 2001). The effective management of older volunteers requires knowledge about their motivation (Clary et al., 1998). Organizations should consider motivational factors when recruiting and retaining volunteers. Discrepancies between the motivation of volunteers and the actual volunteering situation can lead to high turnover, which can be costly for the organization. Older volunteers clearly wish to use their volunteering to express or act on their values (Values), grow and develop psychologically (Enhancement), and learn more about the world or exercise skills that have been unused (Understanding). These appear to be *the main* motivators for older volunteers in both North American and Europe.

More interestingly, because the motivation of older volunteers is apparently consistent across geographic contexts, the

factors that moderate their motivation are likely to be similarly consistent. Volunteer program administrators and volunteer resource managers should therefore consider the life stage and circumstances of their existing and potential volunteers. Evidence indicates that both employment and the loss of a spouse influence the motivation of older volunteers. The literature suggests that these factors affect both the likelihood of volunteering and the number of hours contributed. This study has shown that these factors can also affect the functional motivation to volunteer. In the recruitment and retention of older volunteers, organizations should try to focus on the types of opportunities these volunteers seek, and volunteer assignments should be aligned with the capabilities and availability of the volunteer (Meijs & Brudney, 2007).

Our results suggest that older volunteers who are still employed are more likely than their retired counterparts are to respond to opportunities to gain career-related experience, expand their knowledge about the world, to exercise infrequently applied skills. For example, our findings suggest that accountants who volunteer are not necessarily interested in performing bookkeeping tasks. Depending upon their individual interests and capabilities, such volunteers might be highly motivated to accept positions in public relations, adult development, or other areas.

Older volunteers who have lost a spouse are more likely to respond to opportunities to reduce negative feelings and address their own problems (Protective). These volunteers could be placed in assignments that help them to feel better about themselves. Organizations should therefore focus on acknowledging the expertise and capabilities of older volunteers, as suggested by (Nagchoudhuri et al., 2005). As in all contexts, the effective management of older volunteers requires describing and designing

volunteer assignments to meet the expectations, needs, capabilities, and availability of individual volunteers.

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Table 1

Voluntary Functions Inventory

Function	Conceptual Definition
Values	Volunteering in order to express or act on important values (e.g., humanitarianism)
Understanding	Volunteering in order to learn more about the world or to exercise skills that are often unused
Social	Volunteering in order to strengthen social relationships
Career	Volunteering in order to gain career-related experience
Protective	Volunteering in order to reduce negative feelings (e.g., guilt) or to address personal problems
Enhancement	Volunteering in order to achieve psychological growth and development

Source: Clary et al. (1998)

Table 2

General Outcomes of the Motivation to Volunteer

Variable	N	Mean	Sd
Career	1289	2.27	1.30
Social	1289	3.02	1.34
Values	1289	5.76	0.72
Enhancement	1289	4.24	1.20
Protective	1289	2.99	1.21
Understanding	1289	4.68	1.17

Table 3

Moderation of Motives Due to Employment/Retirement

Variable	N		Mean		SD	
	Employed	Retired	Employed	Retired	Employed	Retired
Career**	268	885	2.79	2.09	1.40	1.20
Social	268	885	3.01	3.03	1.35	1.32
Values	268	885	5.81	5.76	0.67	0.71
Enhancement	268	885	4.35	4.20	1.13	1.22
Protective	268	885	3.01	2.97	1.22	1.21
Understanding**	268	885	4.91	4.58	1.09	1.18

**Significant at the 0.01 level.

Table 4

Moderation of Motives Caused by Loss of Spouse

Variable	N		Mean		Sd	
	Married	Wid/divorced	Married	Wid/divorced	Married	Wid/divorced
Career	1001	181	2.25	2.39	1.28	1.32
Social	1001	181	3.01	3.11	1.34	1.28
Values	1001	181	5.79	5.74	0.67	0.75
Enhancement	1001	181	4.23	4.39	1.20	1.21
Protective**	1001	181	2.92	3.41	1.19	1.25
Understanding	1001	181	4.69	4.77	1.16	1.06

**Significant at the 0.01 level.

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Big Shoes to Fill: How Will the Next Generation of Canadian Seniors Want to Volunteer?

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Abstract

While Canadian organizations indicate that their volunteer base is getting younger, they also observe that their leadership and top-volunteers (i.e., those who volunteer more than 171 hours per year) are older. How can organizations prepare themselves to fill these “big shoes”? Canadians over the age of 65 volunteer differently from the generation before them and, based on what we are learning about today’s baby-boomers, organizations are being compelled to fundamentally rethink their volunteer engagement strategies. This is essential in order to involve baby-boomers now and to be prepared as they move into their senior adult years. The evolving landscape in the non-profit and voluntary sector and the shifts in the public policy environment add to the complexity that volunteer-involving organizations are facing. While current senior volunteers are loyal to organizations and causes they believe in, younger age groups tend to be more goal-oriented and have multiple interests. With each generation of senior volunteers, a higher percentage is volunteering but they volunteer fewer hours per year and are often seeking shorter-term volunteer opportunities. How will organizations weather this transition?

Key Words:

senior volunteers, baby boomers, Canadian Voluntary Sector

Introduction

Filling the “big shoes” being left by senior adult volunteers requires new volunteer engagement strategies that respond to the characteristics of the next generation of senior adults, namely today’s baby-boomers. Volunteer-involving organizations are seeking to develop innovative approaches within the context of three dimensions of a changing landscape: (1) current trends in volunteering; (2) key issues in volunteer resource management; and (3) shifts in public policy. Against this backdrop, a review of the volunteering patterns of different generations of seniors and an in-depth understanding of baby-

boomers’ volunteer interests will illuminate a path forward to both responsive and proactive adaptations to volunteer engagement. Finally, as the explicit reciprocal nature of volunteering increases with each generation, organizations are recognizing the valuable contributions of senior volunteers to society and the positive health outcomes for seniors in remaining connected and fully active participants in their communities (Butler-Jones, 2010).

The Changing Landscape of Volunteering in Canada

According to the Canada Survey of Giving, Volunteering and Participating

(Statistics Canada, 2002, 2006, 2009), there has been a steady increase in the volunteer rate in Canada over the past decade, with the most recent survey reporting more than 12.5 million Canadians (or 46% of people over the age of 15) volunteering an average of 166 hours per year (see Table 1). The majority (77%) of the 2 billion hours that Canadians volunteer each year is carried out by 11% of volunteers, many of whom are senior adults.

While this level of volunteer activity reflects a caring and active citizenry, volunteers are becoming more purposeful and selective about the organizations, causes, and tasks that they undertake. People are generally more goal-oriented, have more structure in their work, family, and social lives, move around the country more frequently, have greater technological skills, are more self-directed, and play a variety of roles and have range of interests (Maranta & Speevak Sladowski, 2010). These general characteristics of today's volunteers have challenged organizations to create more focused, short-term, skills-based volunteer assignments.

The trend towards shorter-term, skills-based volunteer assignments can provide an organization with access to highly specialized services, such as strategic planning, market research, and customized database design, but it can also create some challenges for volunteer programs that rely on continuity and relationship building. For example, in one-to-one volunteering, such as friendly visiting or youth mentoring, it can take several months or more to develop a safe and trusting space, in which the volunteer time can really make a difference.

Leadership volunteering has also been challenged over the past decade. With more people being in temporary work situations (Lam, 2010), it can be difficult to commit to multi-year terms on boards of directors. Concerns about risk and liability issues, the pressures of fund raising, and the power dynamics between board and staff have been identified as barriers for people to take on leadership and governance volunteer positions (Bugg & Dalhoff, 2006). Over the past decade, organizations have responded with amendments to their by-laws that reduce the number of directors, eliminate executive positions, reduce the length of the terms of office, and explicitly allow for voting and meeting participation electronically.

Volunteer resource managers (VRMs) and leaders in the voluntary sector have been observing a gradual evolution in the characteristics of volunteers as well as the patterns of volunteering. They have seen the impact of these shifts first-hand, not only on volunteer programs directly, but on voluntary organizations more broadly.

Key Issues in Volunteer Resource Management

The profession of Volunteer Resource Management has cycles of strengths and challenges that are, in some way linked to broader issues facing the voluntary sector. One of the peaks in Canada was connected to the International Year of Volunteers in 2001. Enormous strides had been made in the 1990's towards making the case for paid positions (e.g., directors, managers, and co-ordinators of volunteer resources) and budgets for volunteer programs. Certificates in volunteer resource management were being offered in hundreds of colleges around

the country and professional associations were gaining both membership and momentum. This led to the development of standards of practice and accreditation programs, and the launching of the Canadian Code for Volunteer Involvement in 2001. The issue of screening of paid and unpaid staff, before working with vulnerable people, became prominent on the public agenda, with some high profile cases of sex abuse involving volunteers and voluntary organizations (Volunteer Canada, 1999). Training and tools were provided to voluntary organizations. VRMs were not only being included, but were being relied upon to lead risk assessment and policy development related to screening. There was collective pride within the voluntary sector of the recognition of the profession of Volunteer Resource Management.

Significant resources were invested by governments, foundations, and corporations to develop tools and resources to strengthen volunteer engagement in Canada, on topics such as youth volunteering, new Canadian volunteers, employer-supported volunteering, and baby-boomer volunteers (Volunteer Canada, 2001). However, with the shift in funding practices in the late 1990's, from core, multi-year funding to short-term project funding, organizations found themselves continuously uncertain about whether or not positions or programs would continue from one year to the next and the infrastructure was eroded as fewer funders were willing to pay for administrative and overhead costs (Scott, 2003). This did not bode well for maintaining Volunteer Resource Management positions or the continuity of volunteer programs.

By 2005, many community colleges had closed their certificate programs in volunteer resource management, volunteer centres were losing funding, and professional development budgets were being cut. The Canada Volunteerism Initiative, which was initiated by the federal government in 2002 to build the capacity of the voluntary sector to engage volunteers and to promote volunteering to Canadians, was abruptly cut in 2006.

As we celebrate the tenth anniversary of the International Year of Volunteers in 2011, we are seeing a renewed interest by funders and policy makers in supporting and strengthening volunteer resource management capacity, a reconsideration of funding practices, and a stabilization and renewal of the leadership organizations, associations, and networks.

Public Policy and Volunteering

There is a growing interest in supporting and promoting volunteering and the voluntary sector in all provinces and territories in Canada (Campbell & Speevak Sladowski, 2009). Many governments have established initiatives to strengthen their relationship with the voluntary sector in their jurisdictions and to address legislative as well as capacity issues facing voluntary organizations (Carter & Speevak Sladowski, 2008). All 13 provinces and territories have Volunteer Service Awards, through their governments and through the Lieutenant Governors and Commissioners. A number of provinces have Ministers with Volunteerism as part of their portfolio or branches with an explicit mandate to promote and support volunteering.

Over the past decade, we have seen the emergence of a plethora of mandatory community service programs,

requiring people to perform community service hours in order to graduate from high school, to receive social assistance, to enter a university program, or to avoid incarceration. This has created both opportunities and challenges for volunteer resource managers, with increased administrative and supervision requirements.

Public policy related to care-giving has a direct impact on volunteering broadly and on senior adults and baby-boomers, in particular. With shorter stays in hospitals, de-institutionalization, cuts to home care services, and increasing work demands, families are having to absorb a great deal of the care-giving responsibilities, previously provided by public services (Centre for Voluntary Sector Research and Development, 2010). Baby-boomers and seniors are often involved in either temporary or ongoing care of disabled adult children, aging parents, grandchildren, and partners with chronic illness. Voluntary organizations and volunteers are also called upon to help meet the demand for care-giving and respite for care-givers (Butler-Jones, 2010).

Senior Volunteers

Over the past decade, we have seen changing volunteer patterns among seniors (over 65 years of age). As the volunteer rate has increased, the average number of volunteer hours has decreased, with each study (Statistics Canada, 2002, 2006, 2009). Voluntary organizations report that their volunteer bases are getting younger while their leadership volunteers are older (Centre for Voluntary Sector Research and Development, 2010). An overwhelming number (95%) of today's senior volunteers indicate that making a

contribution to their community is the most important reason for volunteering, followed by almost 60% who volunteer for social reasons (i.e., either to be with friends or to meet new people; Statistics Canada, 2009). However, we may not assume that all seniors want the same thing, as they are not a homogenous group. "It is important to keep in mind that there are currently different generations of seniors, and that there are significant differences in the volunteering among the older and younger groups of seniors" (Special Senate Committee on Aging, 2009, p.131).

Following the Report of the Special Senate Committee on Aging, the National Seniors Council held round tables to gather views on volunteering and positive active aging. As one of the witnesses, Dr. Elain Gallagher, Director of the Centre on Aging at the University of Victoria, stated, "Some want to make a contribution to their communities. Others want to use their skills and knowledge to learn new things, to develop new skills, to be intellectually stimulated, or to feel good or needed" (Special Senate Committee on Aging, 2009, p.132).

Without making assumptions about all senior volunteers, it is important to be aware of the barriers to volunteering that may exist for some, including transportation, physical accessibility, costs associated with volunteering, cultural and linguistic knowledge, and the range of opportunities and preferences for recognizing volunteer efforts (National Seniors Council, 2010.). As Canada becomes more culturally diverse, with each generation, cultural competencies and linguistic skills will become premium assets sought after by voluntary organizations,

in order to provide culturally and linguistically appropriate services in the community. At one of the round tables held by the National Seniors Council in Iqaluit, “it was identified that the Inuit culture does not recognize the term ‘volunteering’ however a similar concept is the practice of ‘people helping people’. An important focus for Inuit seniors helping people is intergenerational communications and educating youth on Inuit traditions” (National Seniors Council, 2010, p.16).

The federal, provincial, and territorial (FPT) ministers responsible for seniors in Canada have collaborated on an initiative, “Celebrating Seniors”, to promote “positive and realistic images of aging” (see www.seniors.gc.ca). The issue was explored in depth at a symposium held in Montreal, in December 2010, entitled Spotlight on Images of Aging. The topic of stereotypes and language used to describe senior adults was discussed, noting that many terms and images bring to mind people who are helpless, rather than people who are helpful. Of course many people do not consider their age to be their primary identifier and many others have concerns that any label will lead to some form of ageism. Yet without some language to discuss a segment of our population that is growing in terms of its numbers and importance to society, we may inadvertently ignore both the assets and unique needs of the aging baby-boomers. As Sherri Torjman, Vice-President of the Caledon Institute of Social Policy, stated in her address at the Canada at 150 Forum in May 2010, “We can’t afford to sideline more than 25% of the population in future. We need seniors as workers, mentors, volunteers and fully participating citizens.”

Baby-Boomer Volunteers

Baby boomers, born after World War II, between 1946 and 1964, made up a full third of Canada’s population in 2006 (Martel & Malenfant, 2006). If they were to retire from the paid workforce at the age of sixty-five, they would have 25-30 years of retirement. According to *The Evolution of Giving: From Charity to Philanthropy* (BMO Retirement Institute, 2009), they more intentionally integrate their contributions of money and time, citing a recent survey that showed one third of baby-boomers had been engaged in both fund raising and volunteering in the same charity to which they had made a cash donation. “Baby-boomers are a large but distinct demographic group. While their interests may be diverse, they tend to have more formal education than the current cohort of seniors and prefer flexible, episodic volunteering opportunities that use their professional skills, have identifiable outcomes, and are personally meaningful and challenging” (National Seniors Council, 2010, pp.30-31).

Studies have shown that baby-boomers have mixed views, however, on how they want to engage with the community. For some, using their work skills and talents is seen to be the most effective use of their time. Others are worried about being pigeon-holed into doing volunteer work that is directly connected to their professional designations. Many want to expand their horizons and learn something new. In terms of taking on leadership roles, many said that, outside the office, they did not want the pressure of being in charge of something. They bring a wealth of skills and experience to the table but they may not want to spend their time around the table. These

findings presented a mixed picture of what baby-boomers are looking for in their volunteer activities and reinforced that, like other age groups, they are not a homogenous group (Centre for Voluntary Sector Research and Development, 2010).

As indicated in the section on public policy, many baby-boomers are increasingly being called upon to take on care-giving responsibilities. The term “sandwich generation” was coined in the seventies, referring to those caught between the needs of their children and parents. A more fitting metaphor for today’s baby-boomers might be a “triple-decker sandwich, using whole-grain bread.” Baby-boomers are often providing care to their aging parents, helping adult children through work transitions and family re-grouping, and helping to care for grandchildren. They find themselves balancing the multiple demands of the three generations while they watch their fibre intake, support their partners, and are still active in the workforce. This may mean that there is less time to volunteer and that they cannot make long-term commitments, because the demands of their family remain unpredictable.

Baby-boomers have lived through the transition from in-person to on-line life and many are happy to seek volunteer opportunities and even carry out their volunteer tasks on-line. While many non-profit organizations have embraced technology and incorporated it into their engagement strategies, many others are lagging behind, particularly smaller organizations with fewer resources. Baby-boomers have higher expectations than past generations for more sophisticated communication and more structured roles in their volunteer life.

Given that baby-boomers make up such a significant portion of the Canadian population, that they have lived through such fundamental changes in society, and that those born in the late forties and early fifties are now entering their senior adult years, our understanding of this generation is critical. VRMs will need to adapt their volunteer engagement strategies as well as the volunteer services that are provided to senior adults.

Conclusion

Senior volunteers today are contributing on average more hours each year (i.e., 220 hours compared to the national average of 166 hours) but have a lower volunteer rate of 36%, compared with the national rate of 46%. Today’s baby-boomers are close to the national average in terms of their volunteer rate (at 47%) and average number of hours (at 165 hours per year), and given that they comprised a full third of the Canadian population in 2006, they really set the national standard. With close to half of baby boomers volunteering an average of more than three hours each week, while most of them are also working full-time, we can feel confident that their interest in contributing to the community will continue, as they age.

Unlike the current generation of senior volunteers, baby-boomers are likely to have different expectations of the organizations and from their volunteer experiences. Living more structured lives, they may seek more clearly defined volunteer roles and want the organization to be well prepared so that their time is most efficiently spent. Their interest in results means that they will want to receive ongoing feedback about the impact of their volunteering

and to have input into the evaluation of the programs in which they are involved.

Although most senior adults live independently, some will require support in order to continue their volunteer activities. Organizations will need to ensure that they have the policies, systems, and budgets for transportation, physical accessibility, and flexibility of schedules, to accommodate occasional medical issues or visits to children out of town. Organizations will need to look for new board governance models that have opportunities for both renewal and continuity with fewer meetings, shorter terms, and the possibility to participate through electronic communications.

The next generation of senior volunteers will be different because of the confluence of their common characteristics, general trends in volunteering, the evolution of Volunteer Resource Management, and shifts in public policy. Many organizations have already begun to respond to these dimensions of the changing landscape with innovative approaches to volunteer engagement. For example, having people volunteer in pairs or small groups to provide built-in support for the volunteers as well as back-up for the person receiving the service can be mutually beneficial. This can also help mitigate some of the risks inherent in working with vulnerable people.

Many organizations are stuck in old paradigms or simply do not have the resources to embark on the transition. The field of Volunteer Resource Management is at a critical juncture and there is a great deal at risk. Leadership and infrastructure organizations, as well as academic institutions, need to continue to deepen their understanding of the incoming generation of senior volunteers and build the capacity of

voluntary organizations to meaningfully engage them. If we accept the metaphor of today's baby-boomers being the "triple-decker sandwich generation on whole grain bread" then perhaps we can agree that they will not be filling the big shoes being left by today's seniors but they will certainly be filling their sandals.

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Table 1

Volunteer Rates and Average Number of Volunteer Hours Per Year

Year	Volunteer Rate (%)		Average Number of Volunteer Hours Per Year	
	All Canadians over 15 years old	Canadians 65 years and older	All Canadians over 15 years old	Canadians 65 years and older
2000	26%	18%	162	270
2004	45%	31%	168	240
2007	46%	36%	166	220

(Source: Statistics Canada, 2002, 2006, 2009)

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Appreciation is expressed to Ruth MacKenzie and Don Lapierre, of Volunteer Canada and to Melanie Hientz, of the Carleton University Centre for Voluntary Sector Research and Development, for their insights and contributions to the ideas in this article.

**Bridging the Gap: Enriching the Volunteer Experience to
Build a Better Future for Our Communities**

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Abstract

The world of volunteering has changed dramatically over the past decade. Practitioners, policy-makers, and social scientists have been monitoring the impact of the recent trends in Canadian society, shifts in social policy, the evolution of Volunteer Resource Management, and the emergence of more integrated corporate community investment strategies. Key drivers, including technology, the economy, and globalization, have had a profound influence on the voluntary sector broadly and on volunteer programs, in particular. The research explored this changing landscape with a focus on youth, families, baby-boomers, and employer-supported volunteers. It identified the gaps between what today's volunteers are looking for and the opportunities being offered by organizations and offered insights and advice to improve the volunteer experience.

Key Words:

youth, baby-boomers, family volunteering, employer-supported volunteering

Linking Research to Practice

Volunteer Resource Managers, volunteer centres, leaders in the voluntary sector, and potential volunteers were reporting on the growing gap they were observing between what today's volunteers were looking for and the opportunities organizations were offering. There was a need to verify and further explore this anecdotal information in order to develop strategies to better engage volunteers and to improve the volunteer experience. "Bridging the Gap: Enriching the Volunteer Experience to Build a Better Future for Our Communities" is a summary report of a comprehensive pan-Canadian study (Centre for Voluntary Sector Research and Development, 2010), produced by Volunteer Canada and Manulife Financial Corporation.

While the research began with a wide lens, as the world of volunteering was explored, there was a particular focus on learning more about youth, families, baby-boomers, and employer-supported volunteers. This focus was determined based on the analysis of the Canada Survey of Giving, Volunteering, and Participating (Statistics Canada, 2009) which identified these as priority groups for strategic engagement.

Through a total of 18 focus groups, held in every region of the country, with a total of 237 participants, a literature review of more than 200 documents, a snapshot of 200 organizations, a survey of more than 500 volunteers, and a telephone survey of over 1000 households, a clearer picture emerged of the motivations, characteristics, barriers, and aspirations of Canadians for

their volunteer experience. The findings reflected the voices of current volunteers, past volunteers, and those who have never volunteered and captured views from Canadians, in both rural and urban settings. All materials and survey instruments were available in both English and French. A more detailed description of the methodology is available in the full report of the study.

The summary report portrayed today's volunteers as being more goal-oriented, results-driven, mobile, self-directed, with multiple interests. Many seek short-term, skills-based volunteer opportunities that directly improve someone's life. The study also gathered some very direct advice to organizations on how to better engage today's volunteers.

Gaps Identified

The study confirmed and illuminated some serious gaps between what volunteers are looking for and the opportunities organizations are currently offering. These findings will not be surprising for the seasoned practitioner, however, the width of the gap and the risk it poses to the future of volunteering is becoming increasingly critical. While there were differences between youth, families, baby-boomers, and employer-supported volunteers, the following gaps were cross-cutting:

- Many people are looking for group activities *BUT* few organizations have the capacity to offer them;
- Many people come with professional skills *BUT* many professionals are looking for volunteer tasks that involve something different from their work life;
- Organizations are expected to clearly define the roles and boundaries of volunteers *BUT* many volunteers want the flexibility to initiate what

they have to offer (i.e., create their own volunteer opportunity);

- Many organizations still want long-term commitment *BUT* many more volunteers are looking for shorter-term opportunities; and
- Many organizations focus on what they need *BUT* besides helping others, many volunteers come with their own goals to be met.

Advice to Organizations

Volunteers and potential volunteers of all ages and stages gave some very direct advice to organizations on how they can improve the way they engage volunteers. This included basic practices such as building a meaningful relationship with volunteers, understanding where they are in their life cycle, and learning more about their personal goals, motivations, and skills. Developing more integrated human resources strategies was also seen as important so that, regardless of a person's status in an organization, some basic policies, support, and benefits equally apply to both volunteers and paid employees.

Being flexible and accommodating the unpredictable schedule of volunteers as they deal with the competing demands of their work, education, and family life was emphasized by all age groups. Greater sensitivity is needed with respect to gender, culture, language, and age so that organizations are welcoming and inclusive. Finally, while many organizations have really embraced technology and social media, volunteers want more information about volunteering available on-line.

Improving the Volunteer Experience

Two-thirds of current and past volunteers indicated that they had had at least one negative volunteer experience. Respondents identified a number of issues that influenced their level of satisfaction

including organizational politics, a sense that their skills were not well used, and a sense that the organization was not well prepared for them. Many youth talked about their perception of organizations being too bureaucratic or having experienced age discrimination. Families felt that there were not enough intergenerational volunteer opportunities. Baby-boomers wanted to see the impact of their volunteer efforts. Volunteers who were supported by their employers wanted an opportunity to expand their experience and their networks.

Usefulness of this Research Report

The report would be useful for any volunteer-involving organization interested in renewing their volunteer programs by deepening their understanding of today's volunteers and, in particular, how to engage youth, families, baby-boomers, and employer-supported volunteers. Professional associations of Volunteer Resource Managers may use the findings to identify professional development topics or themes for workshops and conferences. Post-secondary institutions with courses in non-profit management or Volunteer Resource Management certificates may also want to incorporate some of the material into the curriculum. Funders, policy-makers, and corporate community investment managers will also find the research helpful in designing their programs, assessing grant proposals, and developing policies. The information about the various cohorts can help decision-makers target their investments more strategically.

The Broader Landscape

The context in which volunteering occurs was examined in great depth, during the study. This included key trends in Canadian society, public policy, the non-profit sector, Volunteer Resource Management, and the field of corporate community investment. Changing demographics, the labour market, immigration patterns, technology, globalization, and shifts in social policy were identified, as key drivers, and were linked to the challenges facing the field of Volunteer Resource management. This component of the research would also be of interest to those working or researching the field of citizen participation, social inclusion, or community engagement.

The summary report is available in both English and French at www.volunteer.ca and the full report is available in English, by request PSpeevak-sladowski@volunteer.ca

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**Green Thumbs, Healthy Joints: Volunteers, Not Dollars,
Predict Engagement with Older Adults**

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Abstract

The Green Thumbs, Healthy Joints program utilizes volunteers to help modify gardening activities using ergonomic tools and raised flower beds with the goal of increasing the involvement of older adults with joint pain. Health promotion programs, such as the Green Thumbs, Healthy Joints program, that facilitate physical activity for older adults with disabilities can be therapeutic, helping to lower the prevalence of risk factors such as cardiovascular disease, hypertension, obesity, and depression. This article assesses the characteristics of the Green Thumbs, Healthy Joints program, including its implementation at 23 different project sites. Volunteers built raised flower beds at each project site and older adult participants with joint pain used the flower beds to participate in gardening activities. Project sites that received a greater number of volunteer hours served a greater number of older adults. Neither the number of volunteer hours committed nor the number of older adults served were related to project sites' budget requests or project site type ("community" vs. "assisted living"). This suggests that the number of older adults participating in the Green Thumbs, Healthy Joints program is primarily related to the number of volunteer hours each project site receives, and that the program may be implemented in a variety of sites.

Key Words:

older adults, volunteer, program evaluation

Introduction

Physical activity modified for older adults who are suffering from a disability, such as arthritis, can be therapeutic and beneficial (Chen, Gill, & Prigerson, 2005; Kesaniemi, Danforth, Jensen, Kopelman, Lefebvre, & Reeder, 2001). The Green

Thumbs, Healthy Joints program sponsored by the Center for Excellence in Disabilities (CED) at West Virginia University (WVU), and funded by the West Virginia Department of Health and Human Services' Osteoporosis and Arthritis Program under the Bureau for Public Health, modifies

gardening accessibility with the aim of increasing older adults' physical activity. Volunteers are critical to the success of the Green Thumbs, Healthy Joints program. Volunteers involved in the Green Thumbs, Healthy Joints program help to implement the program and build wheelchair- and walker- accessible raised flower beds at a variety of sites. The flower beds are then maintained by participants who are primarily older adults with arthritis and other people with joint conditions. Raised flower beds and ergonomic tools are used to help minimize overuse of joints that are susceptible to arthritis and other musculoskeletal conditions, such as carpal tunnel syndrome.

Despite the important role of volunteers in the implementation of community health programs such as Green Thumbs, relatively little research examines the correlates of volunteers' engagement with health-promotion programs (Bryant, Altpeter, & Whitelaw, 2006; Nutbeam, 1998). In this article, we examine correlates of volunteer and participant engagement in the Green Thumbs, Healthy Joints program. We also consider the resources and needs of sites that implement the Green Thumbs, Healthy Joints program. We begin by providing a description of the Green Thumbs, Healthy Joints program and the sites where it was implemented from 2007 to 2009.

The Green Thumbs Healthy Joints Program

Each year, the CED at WVU receives requests for funding to implement the Green Thumbs, Healthy Joints program from organizations across the state of West Virginia. These organizations include senior and community centers, hospitals, gardening clubs, and residential care centers—among others. Funds (up to \$1,000.00 per year) are requested to support the costs of

constructing wheelchair- and walker-accessible raised flower beds and to implement other modifications to increase the accessibility of gardening activities for older adults and others with disabilities.

In 2009, the CED at WVU allocated funding to 21 different organizations to implement the Green Thumbs, Healthy Joints program. Funding was used to purchase and build equipment that enhanced accessibility to gardening activities. For instance, raised flower beds and seats on wheels minimized bending and stooping, while kneeling pads with handrails made working near the ground more accessible. Some raised flower beds were made portable by placing them on wheels so that they could be rolled indoors to be maintained by people of limited mobility. Additionally, extendable water wands with self-coiling hoses and telescopic tools facilitated access to immobile and difficult to reach plants—particularly for people who were in a seated position, such as people who used wheelchairs. Most hand tools that were used in the Green Thumbs, Healthy Joints program (e.g., ratchet pruners), were ergonomically designed with large grips to reduce fatigue. To help minimize strain from lifting, wheeled carts were used to transport tools and other gardening materials.

The Green Thumbs, Healthy Joints gardens are established and maintained by a variety of groups and help to beautify a range of public and private areas across the state. For instance, gardens have been established at public senior and community centers, private personal care and rehabilitation centers, public parks, churches, and public housing facilities. Moreover, the function of Green Thumbs, Healthy Joints gardens is not just limited to increasing accessibility to gardening activities and beautification. Vegetables have been planted in the raised beds, and

have been used as a tool for nutrition education and as a source of fresh produce at some project sites.

The impact of the Green Thumbs, Healthy Joints program has grown in recent years. In 2007, the program was implemented by five different organizations in West Virginia. In 2008, the program was implemented by seven organizations, and by 2009 the number had grown to 21 different organizations. As of 2009, the Green Thumbs, Healthy Joints program had been implemented at a total of 23 different sites where 245 volunteers and 353 participants were involved. Between 2007 and 2009, these sites included four assisted living sites such as hospitals, group homes, and nursing homes, 13 community sites including senior centers, community centers, and public parks, and six other sites, such as private homes, businesses, and apartment complexes. Thus, Green Thumbs, Healthy Joints is a versatile program. It can be implemented at a variety of sites and serve a relatively large number of people with a range of needs.

Resources and Needs

The degree of funding required and the cost-effectiveness of programs are important considerations when designing health promotion programs (Goetzel & Ozminkowski, 2008; Hatziaandreu, Koplan, Weinstein, Caspersen, & Werner, 1988). At the beginning of each year, all of the organizations responsible for implementing the Green Thumbs, Healthy Joints program submit a project budget for the upcoming year, followed by an annual report at the end of each year, which are reviewed by the CED at WVU. These budget requests and annual reports provide information regarding the needs, as well as volunteer and participant engagement, at each site. Project budgets include anticipated need for

monetary support in each of the following categories: materials, tool costs, outreach costs, total estimated budget, and total Green Thumbs, Healthy Joints budget request. Importantly, however, the total number of hours that volunteers commit at Green Thumbs, Healthy Joints project sites is not related to any part of sites' budget requests. Moreover, the number of participants with joint conditions who are served is not related to any aspect of project sites' budget requests. Indeed, the organizations that implement the Green Thumbs, Healthy Joints program are able to engage volunteers and serve participants with little or no regard to the amount of monetary support they request from the CED at WVU (see Table 1.)

Volunteer and Participant Engagement

Project sites' annual reports indicate that volunteer engagement is particularly important within the Green Thumbs, Healthy Joints program. Specifically, the number of participants with joint conditions who are served is positively related to the total number of volunteers. Moreover, the number of participants with joint conditions who are served is also positively related to the total number of hours that volunteers commit. This raises the question of what factors might enhance volunteer engagement.

One factor that may be related to volunteer engagement is the type of Green Thumbs, Healthy Joints site; some sites might be more accessible to volunteers than others. However, when comparing the three types of project sites ("community", "assisted living", and "other"), there is no significant difference in number of volunteer hours committed across the three site categories. Thus, although each project site differs in a number of ways, the Green Thumbs, Healthy Joints program receives a

comparable degree of volunteer commitment across a variety of different sites.

Conclusions and Improving for the Future

The Green Thumbs, Healthy Joints program is versatile—both in terms of the manner and site in which it can be implemented, and in the purpose that it serves. Green Thumbs, Healthy Joints can be primarily or entirely volunteer-implemented at both public and private facilities. Additionally, the program's function can include the facilitation of physical activity for people with joint conditions, community beautification and rejuvenation, horticultural and nutritional education, and the provision of fresh produce.

The importance of having committed teams of Green Thumbs, Healthy Joints volunteers cannot be understated. The relation between the number of Green Thumbs, Healthy Joints volunteers, volunteer hours and the number of participants served suggest that volunteers (and not necessarily budget requests) are most closely related the participation of older adults with arthritis and others with joint conditions. These findings are particularly relevant given the current economic climate where many public and non-profit programs are experiencing budget shortfalls and funding restrictions (Gatty, 2010).

Efforts should be directed toward understanding the reasons why volunteers choose to become involved in health-promotion programs. Indeed, the relevance of understanding factors such as volunteer motivation (Millette & Gagné, 2008) should be made clear to directors of volunteer-implemented health promotions programs. Directors of health promotion programs could collect such information and use it to

improve volunteer recruitment and retention.

The consequences of program participation for participants' health and the health of volunteers should also be investigated in future research. Health promotion programs that increase physical activity can lower the prevalence of depression and risk factors for cardiovascular disease such as hypertension and obesity (Nelson et al., 2007; U.S. Department of Health and Human Services, 1996). Measures that may be appropriate to incorporate in the Green Thumbs, Healthy Joints program, and other similar programs, include the Rheumatoid Arthritis Disease Activity (RADAI; Stucki, Liang, Stucki, Brühlmann, & Michel, 1995), self-reported stress (Cohen, Kamarck, & Mermelstein, 1983), or the Brief Symptom Inventory (Derogatis & Melisaratos, 1983). Collecting such information from both volunteers and participants would clarify whether and how a given health promotion program impacts both groups, and may highlight the need for such programs.

In summary, the success of volunteer-implemented health promotion programs, such as the Green Thumbs, Healthy Joints program, may ultimately depend on the commitment of volunteers; a valuable asset that may be obtained with little or no regard to program funding. The Green Thumbs, Healthy Joints program is a relatively low-cost, volunteer-implemented health promotion program that is adaptable to a range of purposes, and which may be employed in a variety of sites. Because of these characteristics, the Green Thumbs, Healthy Joints program is a strong candidate for replication in areas where volunteer-implemented health promotion programs aimed at older adults are needed.

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Table 1

Pearson Correlations for Total Volunteer Hours, Total Number of Volunteers, Number of Participants, and Budget Requests

	1	2	3	4	5	6	7
1. Total Volunteer Hours	1						
2. Total number of volunteers per project site	.228	1					
3. Number of participants with joint conditions	.773**	.494*	1				
4. Materials budget request	-.043	.390	-.088	1			
5. Tools budget request	-.093	.119	.157	-.269	1		
6. Outreach budget request	.063	.029	.176	-.156	.650**	1	
7. Total budget request	-.108	-.084	-.198	.376	-.210	-.038	1

** $p < .01$ * $p < .05$

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**Volunteer Attrition: Lessons Learned from Oregon's
Long-Term Care Ombudsman Program**

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[Editor-generated] Abstract

Researchers examined the various factors that contribute to the effectiveness of long term care ombudsman programs and the people that participate in such programs. Specific attention was given to a population of elder-care volunteers in Oregon, and the efforts to train and retain these ombudsman. Implications and long term changes are discussed.

[Editor-generated] Key Words: ombudsman, long term care, volunteer attrition

**Lessons Learned from the Long-term
Care Ombudsman Program**

Many Long Term Care (LTC) Ombudsman Program leaders find it difficult to retain sufficient numbers of nonpaid advocates to investigate and resolve complaints on behalf of America's fast growing elder-care population. Although more than 8,000 volunteers assume this federally mandated resident-defense role, these are far too few to adequately monitor all of the country's nursing homes and other long-stay settings (Brown, 1999).

This shortage of volunteers is especially tragic given the mounting research lauding their vital contribution to the well-being of elder-care residents. Ombudsmen volunteers are firmly recognized in the literature as playing a critical protective role, and, more especially, as filling a unique void as vibrant defenders of patient rights (Harris-Wehling, Feasley, & Esters, 1995). Consequently, their

effective deployment and solid support is seen by program leaders as absolutely critical to program success (Estes, Zulman, Goldberg, & Ogawa, 2001; Kusserow, 1991b). Although volunteer retention is a top national priority, it remains a vexing challenge.

Surprisingly there is no published research directly assessing former volunteer ombudsmen's stated reasons for quitting. Nevertheless, a number of role-impeding factors have been explored by a few scholars and government analysts. Most of these factors relate to the ombudsman role itself. These include opposition by facility staff (Litwin & Monk, 1987; Nelson, 1995), poor training and supervision (Harris-Wehling, et al., 1995; Litwin & Monk, 1987) and the fact that most volunteers serve in socially isolated, often dreary and emotionally depressing environments (Portland Multnomah Commission on Aging [PMCOA], 1989). In 1989, local

ombudsman volunteer administrators assessed the leading reasons for volunteer attrition and cited poor health as the top determinant, followed by role stress and strain, trailed by conflicting time commitments (Schiman & Lordeman, 1989).

In this paper, we examine what former volunteers themselves actually maintain as their reason for discouragement and resignation. We begin with a brief overview, followed by study results, discussion and implications.

Study Overview

Context

The Oregon program began recruiting volunteers in 1981 and has maintained an average of just under 200 in service over the years with an annual average turnover rate of about 22%. Given the difficulty of the ombudsman job, this rate does not, on the face of it, seem unduly onerous, but since other state volunteer ombudsman attrition rates are unknown, comparisons are not possible. Regardless, the Oregon program has been recognized for its effective “recruiting, training and retraining volunteers” (Kusserow, 1991a, p. 6). This is despite the fact that its tiny paid staff of eight represents one of the worst ratios of paid ombudsman program staff to volunteers in the nation (Harris-Wehling, et al., 1995), a situation that persists to this day.

To become certified, Oregon volunteers must complete 48 hours of initial training and pass a certification exam before they are assigned to a facility where they are expected to spend an average of 4 hours a week in service. They must complete an average of 8 hours’ continuing education a year and are encouraged to attend monthly support group meetings facilitated by a paid regional supervisor who is also available via toll free telephone during working hours.

Beyond this, however, these supervisors, who work out of the office in the state capitol, are rarely available in person to their volunteers.

Methods

As part of a larger study, four volunteers recruited from the program’s recruitment committees (which are also staffed by volunteers) were trained in phone survey techniques. Over three months, they randomly contacted 136 active and 170 former certified ombudsman to ask the open ended questions reported here. Of those contacted, 96 (71%) active volunteers and 147 (85%) former volunteers responded. Both groups were asked to identify “the most discouraging aspect of the ombudsman’s job.” Former ombudsmen were also asked why they had left the program.

Two investigators independently reviewed each of the 147 response narratives, then categorized and ranked them in order of prevalence. The two ranked response lists were then jointly compared and adjusted for discrepancies in interpretation.

Study Results

The demographic profile of the 147 respondents is similar to that reported for volunteer ombudsmen nationally. Oregon volunteers were typically older (mid to late 60s in age) and overwhelmingly retired. Women outnumbered men by 2 to 1. Former volunteers had served an average of 26 months, compared to the average of 36 months collectively logged by those who remained in service.

Question 1: What factors were the most discouraging to your fulfillment of the ombudsman job?

Of 348 responses, 25 reasonably distinct factors emerged falling into five

general groups (Table 1). The largest general group of 120 responses comprised Program Factors representing 34% of all discouraging factors. These perceived hindrances relate to internal problems of the volunteer has with the ombudsman organization itself, such as training, supervision, program policies and so forth. Of the ten Program Factor subcategories the most important was “poor program support” (34 responses), followed by “conflict with the central office” (staff) (23 responses), and “inadequate training” (17 responses). None of the seven other Program Factors accounted for more than 12 responses, representing no more than 5% of each of the total responses for “the most discouraging aspects of the ombudsman’s job.” It is important to note that although “Program Factors” emerged, albeit marginally, as the leading general group of most discouraging factors, the leading Program Factor subcategory, “poor program support” ranked only second in the list of 25 subcategories.

System Adversity was the second ranked overall group. It comprised 114 individual responses in five subcategories, representing 33% of all discouraging factors (Table 1). This group reflected the volunteers’ vexation with various troubles of the long-term care system. The leading subcategory for this group, “lack of regulatory enforcement” (49 responses, or 14%), was the top-ranked subcategory overall. It was distantly trailed by “poor work by facility staff” (22 responses, 6%). The three remaining System Adversity factors represented no more than 5% of all discouraging factors.

The third major group, Power Factors, reflects the ombudsmen’s perceived lack of clout or authority to influence change. This section accounted for 63 responses, representing 18% of all discouraging factors. “Difficulty effecting change” led this group with 23 responses

(but still only 7% of all discouraging factor responses). No other subcategory in this group represented more than 4% of all discouraging factors.

Only one of the five subcategories of the fourth (Personal Factors) and fifth (Other Factors) ranked groups accounted for more than 3% of all discouraging factors. This was the Personal Factor of “not enough time to do the job,” with 25 responses accounting for 7% of all discouraging factors.

Question 2: What was your reason for leaving the program?

There were 166 responses to this question comprising 25 different categories (Table 2). Personal Factors clearly led the way, with 104 responses representing (63%) of the stated reasons for quitting. Of these, the foremost stated personal reason for quitting was health (24 responses), followed by family (15 responses), then, obtaining a paid job (11 responses, 7%). Eight others issues followed, ranging from time conflicts (10 responses) to no pay (2 responses).

The second ranked reason for quitting involved Program Factors, comprising only 45 responses (27% of the reasons for quitting), dispersed among nine subcategories. Of these, only “conflict with the central office staff” (13 responses, 8%) and “lack of support” (12 responses, 7%) appeared to be important.

Discussion & Implications for Volunteer Retention

Our telephone survey indicates that taking time to ask former volunteers about their experiences can be very insightful. Using a well-trained team of current volunteers to make the calls appears to be a reasonable strategy. Former volunteers were typically eager to discuss their experiences, whether good or bad, and candor developed because of the shared trust of being a fellow volunteer. It was often difficult to close an

interview due to respondents' eagerness to discuss their experiences and in some cases, to critique the program. using volunteers to follow up with others who have terminated provides a follow-up mechanism that could lead to a better understanding of how to strengthen the program. This supports the value of conducting routine, volunteer-administered exit interviews as a sort of post hoc, needs analysis, something the Oregon program did not do.

Several of the categories that emerged as important in this study have implications for other programs. Indeed, Program Factors, which emerged as the most important discouraging factor and second leading reason for leaving volunteer service, presents an obvious beginning framework for assessing not only volunteer termination but how to retain current volunteers. Several factors in this group suggest areas for review: (a) poor program support, (b) conflict with central office, and (c) agency policies appear to be perceived as important hindrances by a sizeable minority of active and former Oregon volunteer ombudsmen. It also seems that these three problems are interconnected.

Perceptions of poor program support are not surprising given the extreme isolation of Oregon's volunteer ombudsmen, who have very little contact with their paid supervisors, probably seeing them for only a few hours every other month, if that. Many volunteers are also isolated from their peers. Research warns that this isolation may force volunteers to rely too heavily on frail residents for socio-emotional support (PMCOA, 1989). It may also cause them to turn to facility staff for help and companionship. This may cause them to assimilate provider (caregiving) values as opposed to their program's lawful reformist and rights-based principles (Nelson, 2000). This misalignment of values may spur much of volunteer-staff conflict as it is suggested

in some volunteer's concerns that paid staff were "too hard on the facility," "unfair," "too adversarial," and so forth.

One attempt by the program to protect volunteer ombudsmen from this co-optation was to rotate them out of their assigned facilities after two years of service. This angered a number of volunteers who had admitted to building close relationships with facility staff. Several quit. Other volunteers resigned after being assigned a "silent-partner" that was intended to protect them from frivolous or false accusations that were being directed their way.

Role conflict may also explain some of the tension between volunteers and staff. Role conflict occurs when volunteers perceive their role differently from others, including their supervisors. The ombudsman job entails many different facets, including those of advocate, mediator, resource broker, lay-therapist, educator and friendly visitor, among others. The extensive literature on role conflict predicts that role-conflicted volunteers will be easily frustrated by supervisors who try to enforce policies that seem inconsistent with the volunteer's erroneous job perceptions. Such misunderstanding may be very difficult to eliminate in programs where volunteers are detached from the socializing influences of their leaders and coworkers (Harris-Wehling, et al., 1995; Nelson, 1995).

It is axiomatic, then, that the ombudsman leaders must creatively increase volunteer support in order to ameliorate program tensions. Specific recommendations that might improve volunteer comfort with agency policies and procedures include the following.

Program leaders must constantly promote the agency's core resident defense values in all formal and informal communications to volunteers: initial and continuing education programs, bimonthly newsletters, monthly support meetings,

telephone advice calls, awards ceremonies and so forth.

Program recruiters and screeners must promote realistic role expectations by neither overselling the ombudsman job nor hiding its “drudge” aspects. To do this will only breed frustration that may be problematic later.

Leaders must communicate the job’s complex and exacting role dimensions through detailed position descriptions, the interview process, initial and ongoing training, and other formal and informal contacts. The goal is to select the right person.

Leaders can reduce volunteer resistance to the somewhat displeasing task of complaint reporting (“too much paper work”) by illustrating how such information can be used to identify problem trends and troubled facilities, so they can be targeted for intervention.

Leaders should prepare performance contracts that specifically address not only key job responsibilities but also the means by which the program will (realistically) support ombudsmen through training and other activities.

Although classic formal job evaluations may be difficult to effectively administer given the agency’s tiny centralized paid staff (and tight budget), volunteers should be asked to self evaluate their performance at least annually. The goal is to encourage the volunteers’ reflective assessment of their accomplishments in key job dimensions, including complaint handling and reporting, resident visits, hours in facility and so forth.

The program should identify and train veteran volunteer mentors to accompany new volunteers as they begin their facility visits. These mentors will model appropriate behaviors that will help neophytes develop appropriate role behaviors and capabilities.

To reduce volunteer isolation, program leaders should provide formal and informal opportunities for ombudsmen to train together and socialize. They should also stress the importance of maintaining a professional “distance” from facility staff (who they are supposed to monitor).

Management should increase long-distance proactive management communication techniques via the telephone and e-mail to reduce volunteer isolation.

Management should form a volunteer advisory board that will explore and recommend ways to increase supportive and meaningful feedback to volunteers.

Ombudsman leaders should employ trained volunteers to conduct exit interviews in order to identify role conflict issues, sources of discontent, training needs and so forth.

Management should invite veteran volunteers to participate in agency staff meetings—especially those volunteers identified for the mentoring role. Although the number who may participate may be small (owing to travel time and expense) the volunteers’ input will be valuable as will their increased sense of job ownership and organizational loyalty. These enhanced pro-agency feelings will find their way back to the field where they will help motivate and influence others.

Above all, leaders must make volunteers acutely aware of how complying with program policies and protocols will directly lead to positive differences in the lives of residents.

Program leaders will have a more difficult time softening the effects of System Adversity. The literature is not optimistic about any major improvements in America’s long-term care system in the new future. The best that an advocacy program may be able to do is to adequately prepare its volunteers to deal with the system’s exceedingly frail clientele; its poorly trained and motivated

front line staff; its insistent efficiency demands, endless routines and complexities; and its frequently disheartening austerity. Here again, program leaders must prepare potential ombudsmen even before they join the program by creating realistic expectations about the nature and extent of the problems that will be encountered.

Conclusion

As long as program relies heavily on older volunteers, health may lead the list of termination reasons. Programs with more resources may seek to develop ancillary roles, as Oregon has done in its large cadre of non-paid volunteer recruiters and, more recently, friendly visitors. Otherwise, all resources must be dedicated to the support and empowerment of those who are willing to engage in interpersonal conflict to benefit those who can no longer advocate for themselves. In the final analysis, only Personal Factors are beyond the control of administrators. Program Factors, a crucial major group of responses, are within administrators' control and it appears to be these factors that are particularly important to volunteers. The majority of circumstances that keep or drive away volunteers stem from situations that could be made more volunteer-friendly: therein lies the challenge.

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H. Wayne Nelson was Assistant Professor in the Department of Health Science, Towson University, MD. Before moving to Towson in 1998, Dr. Nelson had been the Deputy Director of the Oregon State Long Term Care Ombudsman program, which has been nationally recognized for its effective use of volunteers. He had continued to research volunteer motivation and satisfaction issues and most recently had been commissioned by the National Association of State Ombudsman Programs to write a paper assessing the training and certification of both paid and volunteer ombudsman.

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Kevin Borders, Ph.D, and Ruth Huber, Ph.D, were with the Kent School of Social Work, University of Louisville, KY. Drs. Borders and Huber both work with volunteer Long Term Care Ombudsman in Kentucky in development of and training about outcome measures and with other ombudsman programs regarding the documentation of their work.

Table 1

Most Discouraging Aspects of the Ombudsman's Job

RESPONSE	n	%
1. Program Factors, N=120, 34%		
1.1 Poor program support	34	10
1.2 Conflict with the central office	23	7
1.3 Inadequate training	17	5
1.4 Agency policies	12	3
1.5 Required to do monthly report	10	3
1.6 Problems with local volunteer leaders	9	3
1.7 Not enough local contact with volunteers	5	1
1.8 Problems with other volunteers	5	1
1.9 Job too big	3	1
1.10 Not enough ombudsman	2	1
2. System Adversity Factors, n=114, 33%		
2.1 Lack of regulatory enforcement	49	14
2.2 Poor work by facility staff	22	6
2.3 Difficulty communicating with residents	18	5
2.4 Ongoing issues with facilities	14	4
2.5 Issues overwhelming	11	3
3. Power Factors, n=63, 18%		
3.1 Difficulty in effecting change	23	7
3.2 Role too adversarial	13	4
3.3 Conflict with facility staff	11	3
3.4 Personally ineffective in the role	10	3
3.5 Lack of authority	6	2
4. Personal Factors, n=35, 10%		
4.1 Not enough time to do the job	25	7
4.2 Health	6	2
4.3 Transportation difficulties	4	1
5. Other factors, n=16, 5%		
5.1 Volunteer identified with the facility	9	3
5.2 No problems at facility	7	2
TOTALS	348	100

Table 2

Volunteers' Reasons for Leaving the Ombudsman Program

RESPONSE	n	%
1. Personal Factors, N=104, 63%		
1.1 Health	24	14
1.2 Family	15	9
1.3 Paid job	11	7
1.4 Time	10	6
1.5 Burnout	9	5
1.6 Other interests	8	5
1.7 Personal	8	5
1.8 Developed conflict of interest	7	4
1.9 Served long enough	5	3
1.10 Wrong role for me	5	3
1.11 No pay	2	1
2. Program Factors, n=45, 27%		
2.1 Conflict with central office staff	13	8
2.2 Lack of support	12	7
2.3 Local program tensions	5	4
2.4 Too much enforcement in role	4	2
2.5 Fired	3	2
2.6 Paperwork	3	2
2.7 Felt program staff dissatisfied with work	2	1
2.8 Not trained	2	1
2.9 Organization ineffective	1	.5
3. Power Factors, n=10, 6%		
3.1 Feeling ineffective	9	5
3.2 Role too adversarial	1	.5
4. System Adversity Factors, n=7, 4%		
4.1 Too stressful/depressing	3	2
4.2 Trouble with other government agency	2	1
4.3 Provider hostility	2	1
TOTALS	166	100

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**The Impact of the Senior Companion Program on
Quality of Life Outcomes for Frail Older Adults**

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Abstract

The Senior Companion Program (SCP) is a federally supported program to encourage senior citizens to volunteer in their communities with elderly and aging adults, specifically providing home health care to frail older adults. The current article includes results of a study conducted by RTI to determine whether this SCP impacted the lives of older adults in a positive way, and the tangible results of such home health care.

(Editor-generated) Key Words:

home health care, Senior Companion Program, RTI, later life satisfaction

The increasing demand for home health care has placed new attention on the role of volunteerism in the United States (Kilpatrick & Danzinger, 1996). It is believed that volunteers providing home health care services to frail older adults can help relieve the burden on families, caregivers, social service agencies, and home health care professionals (Morris, Caro & Hansen, 1998). Although volunteers remain largely untapped as a resource for frail older adults in the United States, policymakers currently examining the long-term care crisis in America should seriously consider the viability of a volunteer service force to care for the increasing needs of a growing older population. Drawing on the country's resource of volunteers may save time and money for frail adults and for society at large (Wacker, Roberto, & Piper, 1998). In

addition, an impending labor shortage of workers to care for older adults at home creates opportunities for volunteers to serve in new and more extensive ways (National Academy Press, 2000).

The Senior Companion Program (SCP) is one of the three federal senior volunteer programs, funded by the Corporation for National and Community Service ("Corporation"), designed to provide grants to qualified agencies and organizations for the purposes of (a) engaging persons 60 and older, particularly those with limited incomes, in volunteer service to meet critical community needs, and (b) providing a high-quality experience that will enrich the lives of the volunteers. Senior Companions serve an average of 20 hours per week, and they generally visit between two and three clients apiece. The clients they serve are primarily

homebound elderly people in frail health, most of whom live alone. Senior Companions help their clients with the tasks of daily living. Senior Companions help their clients with the task of daily living. Most importantly, they provide vital human contact and companionship for the clients, some of whom have few other links to the outside world.

Overview of Evaluation

In November of 1998, RTI was awarded a contract by the Corporation to examine the impact of the SCP on quality of life and quality of care outcomes for clients served. This paper reports on the 3-month follow-up findings from the client study.

The key study questions to be answered included the following:

1. How does the Senior Companion Program affect the quality of life of frail older adults?
2. What is the level of client satisfaction with Senior Companion Program services compared to similar services delivered by other providers?
3. To what extent do Senior Companions reduce clients' unmet needs for assistance with activities of daily living?

Design and Methods

In order to examine the impact of the SCP on quality of life and quality of care outcomes for clients served, it was necessary to develop a research design that allowed for data collection at multiple points in time. This paper focuses on the 3-month follow-up findings.

A quasi-experimental design was developed with sampling at three stages. First, 50 SCP projects were randomly selected from a national listing. Second, a random sample of four volunteer stations was selected at each of the selected projects

(or a total of about 200 agencies). Third a census was taken of all prospective clients in one of the three client groups: (1) those newly receiving SCP services (the "treatment group" for this study), (2) those newly placed on the waiting list for SCP services (known as "WL"), and (3) those newly receiving other agency services from the community (known as "Other Agency").

Study Development and Data Collection Procedures

RTI staff developed both baseline and follow-up telephone survey instruments that were approved by the Office of Management and Budget (OMB) in fall of 1999. Next, RTI obtained the names of all new clients from the 50 randomly selected SCP projects and over 200 randomly selected community-based agencies that were affiliated with the SCP. Potential clients were accrued from the sites on a monthly basis over an 18-month intake period. Advance letters and study brochures were sent to all prospective respondents at each wave of the study. RTI telephone interviewers contacted each individual to confirm eligibility and schedule a convenient time for telephone interview. The same protocol was followed for all waves of the study.

Eligible individual included those were: (a) 65 years of age or older; (b) either newly receiving SCP services, newly placed on the waiting list for a Senior Companion or newly provided with other community-based services; (c) residing in the community; (d) reachable by telephone; and (e) able to hear and respond to interview questions on their own behalf. A total of 2,104 client were eligible at 3-month follow-up.¹ Over 72% of eligible clients at baseline (n=1,520) and over 90% of eligible clients at 3-month follow-up (n=658) responded to the telephone survey. The analytic sample for this study included all individuals who

responded to both waves of the survey (n=658 unweighted or 54,103 weigh).

Analytic Methods

Descriptive and multivariate procedures were used to analyze data at baseline and 3-month follow-up. Ordinary least squares (OLS) regression procedures were used on continuous outcome variables, and weighted logistic procedures were used on dichotomous (yes/no) outcome variables.

Sample Characteristics

Table 1 presents weighted descriptive information on the characteristics of individuals in each of individual in each of the client group baseline, with baseline differences noted relative to the SCP client group. The variables listed in Table 1 were used as control variables in multivariate analyses. Overall, the sample was fairly senior in age (mean age between 77-81 years old), female, white with less than a high school education, widowed, and living alone. Only a minority of respondents was in excellent or very good health, and many individuals had prevalent health conditions. Even so, most individuals were only slightly functionally impaired and were in good mental health (Table 1).

There were no significant differences between the three client groups in the proportion of females responding to the survey, the proportion married or widowed, the educational background of study respondents, their geographic location, self-reported health, independence with instrumental activities of daily living, prevalence of medical conditions, or overall satisfaction with life. However, clients from the two comparison groups (WL and Other Agency clients) differed by from SCP clients with respect to some baseline characteristics. The Other Agency client group was disproportionately younger and relatively less likely to be white than the SCP group, whereas the WL group was

more likely to be of Hispanic descent. Those in the WL or Other Agency group were less likely to live alone relative to the SCP group. Those in the WL group scored slightly lower on both the ADL subscale and the overall functional status scale relative to the SCP group. Finally, those in the WL group reported a slightly larger number of depressive symptoms at baseline. These initial baseline differences were controlled for in multivariate analyses.

Client Outcomes and Study Findings

The client study outcomes and key findings are reported by research question below.

Question 1: How does the Senior Companion Program affect the quality of life of frail older adults?

To answer this first study question, we analyzed study outcomes representing the following quality of life domains:

- physical health status
- functional status
- mental health status
- social well-being

The physical health status outcomes considered at 3-month follow-up included the following four study items:

- What is your current health status?
Response options: 1=poor health to 5=excellent health
- How does your health now compare to one year ago? Response options: 1=much worse now to 5=much better now
- To what extent have physical problems limited social activities in the past month? Response options: 1=not at all to 5=extremely
- To what extent have emotional problems limited social activities in the past month? Response options: 1=not at all to 5=extremely

The functional status outcomes included three scale items:

- A composite scale examining six Activities of Daily Living (ADL), including ability to eat, bathe, dress, get in and out of bed, walk, and groom oneself, with higher values indicating greater functional independence
- A composite scale examining seven Instrumental Activities of Daily Living (IADL), including ability to use the telephone, get to places outside of walking distance, go shopping for groceries or clothes, prepare meals, do housework, manage money, and take medications, with higher values indicating greater functional independence
- An overall summary functional status scale, including all thirteen ADL and IADL items combined, with higher values indicating increased functional independence.

The mental health status outcomes included the following two measures:

- A composite life satisfaction scale, examining eleven different aspects of life satisfaction among older adults, with higher life values signifying greater satisfaction with life
- A composite depressive symptoms scale, examining nine depressive symptoms, with higher values signifying increased depressive symptoms.

Finally, the social well-being outcomes included the following two study items:

- How many friends have you seen or spoken to on the phone in the past month?

- How many times in the past month have you gone out socially with other people?

With respect to physical and functional status outcomes, we found the following significant differences between client and 3-month follow-up:

- WL clients reported their current health status to be somewhat lower than that of SCP clients. While SCP clients had an adjusted mean score of 2.46 on this 5-point index, WL clients had an adjusted mean score of 2.15, or 87% as high an adjusted mean score as for SCP clients. (Higher values indicated better current health).
- WL clients reported having a 7% lower functional status score (indicating somewhat less independence) relative to SCP clients.

With respect to mental health outcomes, we found the following differences between SCP and WL clients:

- WL clients reported having a somewhat lower adjusted mean score on the life satisfaction scale relative to SCP clients. While SCP clients had an adjusted mean score of 5.97 on the life satisfaction index, WL clients had a score of 5.06, or 85% as high as an adjusted mean score as for SCP clients. (Higher values indicated greater satisfaction with life).
- WL clients reporting having a somewhat higher adjusted mean score on the depressive symptoms scale relative to SCP clients. Specifically, SCP clients had an adjusted mean score of 2.74 on this index while WL clients had an adjusted mean score of 3.25, an

approximately 16% higher relative value on this index. (Higher values indicated a larger number of depressive symptoms).

Finally, there were no differences between SCP, WL, and Other Agency clients in social well-being at 3-month follow-up.

Question 2: What is the level of client satisfaction with Senior Comparison Program services compared to similar services delivered by other providers?

Both overall satisfaction with care and satisfaction with care and satisfaction with individual components of care were assessed for all SCP clients and for those WL and Other Agency client ho were receiving some other form of in-home care at 3-month follow-up. Seven individual satisfaction items were evaluated, and an overall composite satisfaction scale, ranging from 0-14, was created by summing across all seven satisfaction items, with higher values indicating greater levels of satisfaction with care.

Although SCP clients, those WL clients using other services, and those Other Agency clients using other services were all satisfied with their overall level care (e.g., the adjusted mean overall satisfaction scale ranged from 12.25 to 13.11), the following differences were found:

- SCP clients scored 8% higher on the overall satisfaction with care scale relative to WL clients.
- WL clients were less likely than SCP clients to be very satisfied with the amount of time off given to family members. Specifically, WL clients had only 18% odds of being very satisfied with the amount time off given to family members relative to SCP clients.

- WL and Other Agency clients were less likely to be very satisfied with the amount of time they spent with their in-home provider. Specifically WL and Other Agency clients only had 24% and 17% odds, respectively, of being very satisfied with the time that they spent with their companion/aide relative to SCP clients.

Question 3: To what extent do Senior Companions reduce clients' unmet needs for assistance with activities of daily living?

The following three questions were asked of clients to assess their unmet needs for care:

- During the past 3 months, was there any time when you needed more help with personal care in your home but were unable to get it yourself (yes/no)?
- During the past 3 months, was there any time when you needed more help with meal preparations in your home but were unable to get it (yes/no)?
- During the past 3 months, was there any time when you needed more help with special transportation from your home but were unable to get it (yes/no)?

Results from the analyses of these three questions reveled that WL clients and Other Agency clients had some perceived unmet needs relative to SCP clients at 3-month follow-up. More specifically:

- WL clients were over 5 times more likely than SCP clients to have unmet needs for personal care. Similarly, Other Agency clients were almost 4 times more likely than SCP clients to have unmet needs for personal care.

- WL clients were over 2 times more likely than SCP clients to have unmet needs for special transportation. There were no differences between the three client groups in unmet need for assistance with meal preparations.

Discussion

The SCP is currently one of several national service programs slated for expansion under President Bush's USA Freedom Corps Initiative. Given the findings reported here, it is clear that the program has small, but positive, effects on client well-being at 3-month follow-up. Currently, the federal government supports the SCP through grants to agency sponsors (where the SCPs are housed) and small stipends (approximately \$2.55/hour) to Senior Companions for their service to the community. The proposed FY 2002 budget called for expending \$39.1 million in support of this program (Corporation for National and Community Service, 2002). Given that this program is relatively inexpensive to support, and provides an excellent way to match the growing demand for long-term care with the opportunity for volunteer strategies to engage the growing number of old and near old to address this increasing service need, it is not surprising that the SCP has become the focus of increased attention by the Bush Administration ("Bush seeks," 2002).

With the large baby boom population approaching retirement, the SCP provides an opportunity for the well-intentioned seniors to give back to their communities. While only 44% of the adult population generally volunteers in a given year (Independent Sector, 2002), it is possible that by offering individuals new opportunities to serve their communities, larger numbers of baby boomers will participate in this type of service program. At the same time, with the

number of Americans over age 65 rapidly increasing from 4.2 million in 2000 to 8.9 million in 2030 (Administration on Aging, 2001) there soon will be a pressing need for policymakers to find alternative ways to serve frail older adults at home.

The U.S. House of Representatives has recently proposed legislation reauthorizing the Citizen Service Act of 2002 (H.R. 4854), to reduce existing restrictions placed on many of the Corporation's senior volunteer programs. Various versions of the bill have been promulgated expanding the eligibility of seniors to volunteer and reducing barriers to entry. The existing SCP eligibility requirements increasingly have hampered SCP directors, many of whom have had difficulty filling their Senior Companion "slots" because potential volunteers either: (a) were too young, (b) were of an income exceeding the 125% poverty guidelines or (c) wanted to serve fewer than 20 hours per week. If the Citizen Service Act of 2002 becomes law, it will become significantly easier to recruit and retain an expanded number of Senior Companions in the future. These additional volunteers will contribute to the long-term care workforce by further expanding the supply of independent living services to frail older adults living at home.

Endnote

¹Reasons for loss of eligibility between baseline and 3-month follow-up included: death (n=19); mental or physical incapacity (n=176); institutionalization (n=7); no longer receiving SCP services, no longer on the waiting list, or no longer receiving other agency services (n=498); and no phone or no valid phone number (n=81).

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Table 1

Weighted Descriptive Data for Analytic Sample by Client Group

	SCP	WL	Other Agency
	(N=21, 930)	(N=11, 180)	(N=20, 993)
Baseline Characteristic	% or Mean (SD)	% or Mean (SD)	% or Mean (SD)
Sociodemographic Characteristics			
Age (in years)	80.7 (0.96)	79.2 (0.65)	76.8 (1.01)**
Gender (% female)	86.5%	84.4%	76.3%
Race (% white)	82.1%	75.2%	63.9%**
Ethnicity (% Hispanic)	3.0%	14.5%	3.3%
Education (% < high school)	42.2%	42.8%	27.8%
Geographic location (% rural)	46.2%	30.7%	33.6%
Social Support			
Marital status (% married)	10.0%	15.6%	22.1%
Marital status (% widowed)	68.8%	67.2%	62.4%
Living arrangement (% alone)	83.6%	66.2%	67.0%*
Health/Functional Status			
Self-reported health			
(% excellent/very good)	10.9%	16.9%	14.2%
ADL sub-scale (range 0-12)	10.9 (0.11)	10.2 (0.25)**	10.4 (0.27)
IADL sub-scale (range 0-12)	10.3 (0.23)	9.6 (0.31)	10.0 (0.38)
Functional status scale (0-26)	21.2 (0.35)	19.8 (0.53)*	20.5 (0.61)
Prevalent Conditions			
Diabetes (%)	24.2%	32.9%	42.4%
Stroke (%)	22.2%	27.4%	18.6%
Heart Disease (%)	50.0%	51.1%	36.2%
Psychological Characteristics			
Life satisfaction scale (0-11)	6.2 (0.29)	5.4 (0.24)	5.7 (0.38)
Depressive symptoms (0-9)	2.4 (0.09)	3.5 (0.19)**	2.9 (0.31)

Note: Comparisons reflect differences between each client group and the SCP client group.

*significant at $p < .05$

**significant at $p < .01$

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**Serving and Keeping Those Who Serve:
Foster Grandparents and Their Own Family Needs**

Ellen S. Stevens

Abstract

This article presents finding from exploratory research with 52 culturally diverse senior adult volunteers serving as Foster Grandparents in the southwestern United States. The focus is on satisfaction in later life and volunteers' needs for social support. Practice and evaluation strategies are proposed to determine the linkage between social support, life satisfaction, and improvised volunteer retention.

Key Words: foster grandparent, later life satisfaction, volunteers

Introduction

The Foster Grandparent Program of the National Senior Service Corps matches low-income senior adult volunteers with children and adolescents with special needs. Children and adolescents receive emotional support and mentoring from seniors who gain enhanced self-esteem from those activities, and communities reap valuable service. Millions of dollars in service are provided by nearly 24,000 Foster Grandparents (Corporation for National Service, 1997). Benefits provided are a small, tax-free stipend, assistance with transportation, meals, and supplemental insurance during service, and an annual physical examination. Their payback—in addition to these concrete benefits and the gratification they experience from serving—may be enhanced through the social connections Foster Grandparents make that support their own “family values.”

This article presents findings from an exploratory study that inquires into the social support needs of Foster Grandparents. Specifically, the nature of relationships with family and friends is assessed and the following questions are addressed:

- To whom do senior volunteers turn for social support?
- Which relationships enhance life satisfaction?
- What can volunteer organizations do to meet the needs of senior volunteers from diverse cultural backgrounds?

The focus here is on what Foster Grandparents say about their relationship needs. Through this information, administrators of volunteer organizations and practitioners at placement agencies can generate ideas about where their volunteers are coming from and what to do to help them stay.

Background

As America proceeds through an era of cost-cutting and retrenchment, her volunteer workforce is being pushed to the force. A significant cadre of this workforce is senior adult volunteers who are vital contributors to the national economy. Senior adult volunteer programs produce over \$1 billion in volunteer service. The Foster Grandparent

Program alone, contributing approximately 22 million hours of service each year, produces \$243 million in volunteer service exclusive of programmatic costs (Corporation for National Service, 1997). As a result, requests for proposals are increasingly being issued for the development of more Foster Grandparent Programs (University of Houston, 1997).

Greater expectations are being imposed upon volunteer organizations as service agencies, with good intentions and fiscal constraints, look to volunteers to fill the gaps (McSweeney and Alexander, 1996; Wilson and Simon, 1993), gaps that can be filled with productive seniors. The fiscal benefits of volunteer service can be undermined by excessive costs incurred by volunteer turnover. Keeping senior volunteers satisfied is time- and cost-effective (Heard, 1997; Stevens, 1991).

The satisfaction of senior volunteers is related to giving as well as receiving. The giving of one's self, by way of skills and talents, may lead to a sense of usefulness that, for many, is the payoff (Stevens, 1993a, Wilson and Simon, 1993). Receiving can happen through formal recognition at ceremonies, informal recognition through camaraderie and praise, and concrete benefits such as stipends—all of which heighten the value of the volunteer experience (Asche and Janey, 1989-90; Corporation for National Service, 1997; Fisher, 1995; Stevens, 1992; Stevens, 1993b). The many senior volunteers who live alone can, through volunteering, engage in a give and take for mutual benefit. Older adults who live alone in their communities are said to benefit from the social support and sharing provided by friendships. Well-being is supported by having a confidante—even at a distance and maintaining ties with old friends. This lends support to the “socioemotional selectivity theory of aging”

that attests to the value of relationships which are tried and true (Potts, 1997).

Purpose of the Study

The purpose of this study was to increase understanding of the social support needs of Foster Grandparents and to shed light on services that can sustain the service they provide. Research into what Foster Grandparents say about their social support needs and relationships forms the basis for practice implications.

The study intended to answer three questions: 1) Who are the study's Foster Grandparents? 2) To whom do they turn for social support? 3) What do the demographics and support systems of this population mean for volunteer organizations that want to find and keep senior volunteers?

Research Methodology

Foster Grandparents serving communities in the southwestern United States voluntarily completed a 45-item questionnaire about “social support” and “satisfaction in later life.” Social support was defined as “frequency of contact with family for the purpose of sharing activities, visits, belongings, and doing factors,” and “frequency of contact with a significant other for the purpose of sharing personal feelings and concerns” (Mangen and Peterson, 1982). Satisfaction in later life was defined as “the overall quality of existence as derived from the comparison of one's aspirations with one's actual achievements” and was measured by the Life Satisfaction Index (Neugarten, et al., 1961).

The questionnaire also inquired into socio-demographic characteristics such as age, gender, marital status, education, income, occupation, health, race and ethnicity, and community residence. It was pre-tested for reliability and validity with a sample of older adults and was personally administered to the study sample.

The study sample included senior volunteers from two Foster Grandparent programs. Members of the first program served in an urban area and were part of a larger study who completed the questionnaire in 1989 (n=31). Members of the second program served in a rural area and completed the questionnaire in 1997 (n=21). The total study sample is 52.

Data Analysis

Information provided by the 52 senior volunteers was analyzed through the Statistical Package for the Social Sciences (SPSS). Frequency distributions, cross-tabulation tables, and Pearson correlations were utilized to describe and understand the data provided by these volunteers. Data analysis focused on determining how “contact with family” and “contact with a significant other” were associated with “later life satisfaction” for this culturally-diverse group of Foster Grandparent volunteers.

Findings

Who are these Foster Grandparents?

The volunteers in this study—from a rural and urban area of the southwestern United States—exemplify senior adult cohorts most on the rise: racial and ethnic minorities who are older elders. This is not to say that Caucasian elders are not Foster Grandparents—some are—but in this study 90% of the overall sample self identified as members of minority groups. More than three-fourths of the sample were in their seventies and older. Sociodemographic characteristics are identified in Figure 1.

While a majority of these Foster Grandparents have age and minority status, they are all low in socioeconomic status. Overall, the majority had no more than grade school educations and incomes of less

that \$5,000 per year. The majority are women who are now on their own. They enjoy relatively good health and residential stability.

Levels of later life satisfaction ranged from “low” to “high,” with half of the Foster Grandparents indicating “moderate” levels of life satisfaction. About one-third indicated “high” satisfaction, and a smaller percentage indicated “low” levels.

Overall, these Foster Grandparents were moderately satisfied with life, of low socioeconomic status, and were women who were often minorities living alone in their communities of long-term residence. Some rural-urban differences were notable.

The rural elders were more culturally diverse with the majority Hispanic (43%) and the second largest group African American (29%). These elders expressed somewhat higher levels of life satisfaction (40% were “highly satisfied,” compared to 29% of urban elders) and socioeconomic status (45% reported incomes of \$5,000-\$10,000, compared to only 21% of urban elders).

The urban elders were usually African American (90%), more likely to be widowed (55%), compared to 33% of the rural elders), and poorer in income (71% had incomes of less than \$5,000, compared to 45% of the rural elders). They were somewhat lower in life satisfaction (13% indicated low satisfaction compared to 10% of the rural elders). These rural-urban differences are summarized in Figure 2.

A primary study purpose was to identify sources of social support and determine how this “support” links with “satisfaction.”

To whom do these Foster Grandparents turn for social support?

The types of social support analyzed in this study were “contact with family” and “contact with significant other.” Contact with family—for the purpose of sharing

visits, activities, and belongings, and doing favors—was measured by “frequency of contact with relatives.” Contact with a significant other—for the purpose of sharing personal feelings and concerns—was measured by “frequency of contact with family member or friend.” Figure 3 shows to whom volunteers turn for social support.

Contact with family was at “moderate” levels for most. Contact with a significant other was at “high” levels for most. For these volunteers there was less contact with family than with significant others. Less contact with family, more contact with significant others: Which type of contact relates to life satisfaction?

For these Foster Grandparents, it was contact with family that made the difference. The volunteers who were most satisfied were those with the most family contact ($r=.62$, $p<.01$), indicating a highly significant and moderately strong association between family contact and satisfaction. This lead to inquiry into marital status. Was it involvement with a spouse that made life satisfying? Not necessarily. There was no indication that being married was associated with higher satisfaction in later life for these volunteers.

When volunteers in urban and rural settings were analyzed separately, contact with family was salient for both groups. Rural volunteers had more frequent contact with family and, for them, giving and receiving social support was also significant.

Even though many volunteers shared personal feelings with family or friends, it was getting together with relatives for activities, visits, the exchange of belongings, and doing favors that seemed to bring satisfaction in later life. Figure 4 itemizes the components of contact with family.

In summary, when it comes to social support, family togetherness has much to do with life satisfaction for these senior volunteers, the majority of whom are

women from minority groups who live alone. For the rural elders who had more frequent family contact, both frequency of contact and giving and receiving support were related to satisfaction. It was the rural elders who expressed higher levels of life satisfaction.

Implications for Practice

Demographic projections forecast a growing number of ethnic minority elders, the prototype of Foster Grandparents. Volunteer administrators can anticipate a growing number of culturally-diverse seniors who choose a volunteer career in later life (A. Monk, personal communication, 1984; Wilson and Simon, 1993).

The importance of family to this diverse group of senior volunteers suggests implications for the support functions of volunteer organizations. Seniors who volunteer to serve children are, in all likelihood, carrying out their own family values, the values they place on family membership, belonging, involvement. However, for many Foster Grandparents their own families—families of origin and families of procreation—are out of reach. Most volunteers in this study were widowed, divorced, or separated, and living alone. These elders may be among the few remaining survivors of their families.

What can Foster Grandparent programs (and possibly other programs) do to address the cultural value of family when family is gone? the benefits that may result from addressing this issue may result from addressing this issue may enhance the recruitment and retention of this population by meeting the needs of those who are meeting the needs of others.

Recruitment

While Foster Grandparenting does not pretend to replace family, it may serve some of its functions. Activity-sharing, visits,

doing favors, and borrowing and lending establish the importance of connectedness between elders and others and imply an interchange with the senior volunteers. Can volunteer programs tap into volunteers' ideas about family and their concerns about their own families? And in doing so, can the volunteer experience engender a culture of connectedness for senior volunteers? Since sharing, mutuality, and exchange are valued in the context of family, are there ways that volunteer administrators can address these needs in the volunteer milieu? Empowered seniors are likely to express their needs, if invited, to agency staff. Offering the opportunity and acknowledging the need for involvement is what matters.

Senior volunteers can impact the volunteer organization through its recruitment strategies. Who better than current, satisfied volunteers to reach out to peers for organizational affiliation? And given the long-term community residence of most of these volunteers, potential volunteers who live nearby may be a source of connection to one another as they travel to and from the volunteer work site together. Their residential stability, in both rural and urban settings, bodes well for retention on the job. Community-based peer recruitment could boost the cadre of senior volunteers and become the resource to meet ever-increasing community needs.

Retention

In-service sessions, inherent to Foster Grandparent programs, can address volunteers' changing roles and relationships. Only moderate amounts of family contact were the experience for most, the contact that was most associated with satisfaction with life. The partnership between volunteers and organizational leadership could be the unit that sets the training agenda. One option could be a focus on family—the families of foster grandchildren

and their Foster Grandparents themselves. In-service sessions could periodically deal with support for Foster Grandparents whose own families are out of reach.

Such a support function could be offered through volunteer peer group sessions that provide opportunity to recollect past events that the volunteer's own family enjoyed together, reminisce about relatives and meaningful relationships both past and present, and relive memories the volunteer is fond of or grappling with. Volunteers will hear the accounts of others and learn they are not alone. Connecting with others who share some of the same inner life can bring a meaningful past into the present and create social linkages that enliven a sense of family and bond peers to each other.

Some questions that address volunteers' family values might include:

- What kinds of things did you and your family do together?
- What did you do for them? What did they do for you?
- What are some of the high points you remember? Some of the low points?
- How are your family members living on through your life?

Senior volunteers can be organizational partners in the planning and facilitation of these sessions.

Evaluation of Program Effectiveness

It would not be at all surprising if this reliving of family memories enhanced the later life satisfaction of Foster Grandparents and if enhanced satisfaction, in turn, enhanced retention. The impact of family-focused programming can be evaluated to determine its impact on life satisfaction. Thus, the relationship between social support, satisfaction, and retention would be evaluated as follows: Family-focused

support group→ Later life satisfaction→
Senior volunteer retention.

The evaluation of support group effectiveness could be done by 1) measuring later life satisfaction using the Life Satisfaction Index (Neugarten, et al., 1961); 2) implementing the support group function as a component of in-service training sessions; and 3) again measuring later life satisfaction using the Life Satisfaction Index.

Does the support group function lead to higher levels of life satisfaction? Are the volunteers who are higher in satisfaction the volunteers who are staying on the job?

Summary and Conclusions

There are a quarter of a million senior volunteers who are, relative to all elders, often poor and members of minority groups. Like many other elders, they often are widows who live alone. These volunteers are giving their talents, skills, time, and lives. They are out on the front lines influencing society's next generations. They are a valuable human resource. Agencies want to find them and keep them. Senior volunteer programs at large are experiencing challenges with recruitment, retention, and costly turnover. Financial subsidies and fringe benefits provide incentive and reward to Foster Grandparents, but research into what contributes to satisfaction in later life portrays an opportunity to further serve those who serve.

While not meant to generalize to all seniors, this study of a small, culturally-diverse sample of Foster Grandparents presents findings worth of consideration and further exploration in other settings:

- Frequent family contact is associated with higher levels of later life satisfaction;
- For rural elders who had more frequent contact with family, the giving and receiving of family

support it associated with higher levels of later life satisfaction;

- Minority group members are a fast-growing cohort of the aging population and constitute a sizeable proportion of elder volunteers; and
- Elder volunteers may be the few remaining survivors of their families with remembrances in need of expression.

Recognizing the needs of these elders—many of whom experience racism, classism, ageism, and sexism—meets the mutual needs of volunteer and all volunteer organizations that utilize, or could possibly utilize, a senior volunteer resource. A culture of connectedness through partnership—with the organization and with other volunteers—can facilitate the expression and actualization of the values of family membership, belonging, and involvement. Recruitment can be enhanced by elder volunteers who reach out to peers to join the volunteer family. Retention can be addressed through in-service support groups that acknowledge the value of family to elderly volunteers. Evaluation can measure levels of life satisfaction and retention.

The human resource of senior volunteers is alive and well and growing. As the population ages and increases in diversity while public resources shrink, senior volunteers who are well-served can continue their service provision. Supporting their efforts through research-based practice directions can further their well-being. Facing their own constraints while service needs mount, organizations can enjoy productive and mutually satisfying partnerships with senior volunteers and benefit from the person-power they provide.

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Ellen S. Stevens' research with senior volunteers began during her doctoral studies at Columbia University and continued through her role on the faculty of the University of Houston Graduate School of Social Work. Her interest was the enhancement of life satisfaction for growing cohorts of senior adults who may choose a volunteer career in later life. Practice-related publications appeared in the *Journal of Gerontological Social Work*, *Families In Society*, *Clinical Gerontologist*, and *The Journal of Volunteer Administration*. Her research was presented at national conferences of the American Society on Aging, the Gerontological Society of America, and the National Organization for Human Service Education.

Figure 1

Who are the Foster Grandparents of the study? Socio-demographic characteristics of the study sample

Age		Race and Ethnicity		Annual Income	
60-69	24%	Black	65%	< \$5,000 (approx)	61%
70-74	34%	Hispanic	21%	\$5,000-9,999	31%
65-79	22%	White	10%	\$10,000-14,999	4%
80-89	20%	Other	4%	\$15,000 or more	4%
TOTAL	100%	TOTAL	100%	TOTAL	100%
Education		Occupation		Gender	
<Grade school	21%	Housework	43%	Female	79%
Grade school	39%	Office work	10%	Male	21%
High school	36%	Business & Managerial	23%		
College grad	4%	Professional	12%		
		Other	12%		
TOTAL	100%	TOTAL	100%	TOTAL	100%
Marital Status		Health		Residential Stability	
Married	23%	Excellent	14%	>15 Years	88%
Widowed	46%	Good	48%	10-15 Years	2%
Divorced	27%	Fair	30%	5-10 Years	2%
Separated	2%	Not very good	8%	1-5 Years	8%
Never married	2%				
TOTAL	100%	TOTAL	100%	TOTAL	100%
Household composition		Later Life Satisfaction		Geographical Setting	
Myself only	52%	Low	16%	Urban	60%
Myself + 1	34%	Moderate	50%	Rural	40%
Myself +>2	14%	High	34%		
TOTAL	100%	TOTAL	100%	TOTAL	100%

Figure 2

Rural-Urban differences

Foster Grandparents in <i>Rural</i> Settings	Foster Grandparents in <i>Urban</i> Setting
Hispanic and African-American	African-American
Higher Socioeconomic Status	Lower Socioeconomic Status
Married or Widowed	Usually Widowed
Higher Life Satisfaction	Lower Life Satisfaction

Figure 3

To whom do volunteers turn for social support?

Contact with family		Contact with significant other		Who is the significant other?	
Low	20%	Low	8%	Family member	59%
Moderate	55%	Moderate	41%	Friend	39%
High	25%	High	51%	None	2%
TOTAL	100%	TOTAL	100%	TOTAL	100%

Figure 4

Items measuring “contact with family”

<p>“Contact with Family” was measured by the Participation in the Extended Family Scale (Mangen and Peterson, 1982), with items as follows:</p> <ol style="list-style-type: none"> 1. How often do you visit in the homes of relatives whether here or elsewhere? 2. How often do you engage in activities with relatives outside your homes? 3. How often do you borrow things from or lend things to relatives? 4. How often do you do favors other than lending for your relatives? 5. Do you visit more with friends or relatives?
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**The Leadership Institute for Active Aging:
A Volunteer Recruitment and Retention Model**

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Cathy D'heron

Abstract

Baby boomers want and expect more from their volunteer experience. They are eternal optimists about the future, exude a "we can do anything" spirit, are individualistic in their personal pursuits, openly question authority and are reformers. Baby boomers are redefining the meaning of retirement and volunteer service. Organizations must now compete with each other to attract and retain a better-educated, diverse and outcome-focused baby boomer generation. Attracting and retaining baby boomers as volunteers will require organizations to redefine and reframe their message. The internal operational paradigm of service must be refocused to include the transference of knowledge from the workplace to meaningful community service, provide a role for decision-making within the organization and generate flexible meaningful roles that facilitate personal growth and service learning. The University of Maryland Center on Aging in collaboration with the Corporation for National and Community Service and AARP (formerly known as the American Association of Retired People) facilitated the development of several national demonstration models to determine the best practices in recruiting and retaining baby boomers as volunteers, including The Leadership Institute for Active Aging, a service learning model implemented in West Palm Beach, Florida through the area Agency on Aging of Palm Beach/Treasure Coast, Inc. The history, conceptual thinking, curriculum and program administration approaches are detailed along with outcome measurements.

[Editor generated] Key Words: Baby Boomers, volunteering in later life, AARP, volunteer recruitment and retention

Introduction

The first wave of baby boomers, 77 million strong, begins to turn 65 in the year 2011 (Older Americans, 2000) and they are unlike any other previous generation. Their collective voice has affected and will continue to affect public policy and consumer spending and will redefine retirement and leisure. The future of senior service and volunteerism will be dramatically impacted by current demographic trends. These trends are having

a riveting impact on our entire social and economic infrastructure. Baby boomers are not attracted to many of the traditional roles often relegated to volunteers such as stuffing envelopes, answering the telephone, or making photocopies. Existing organizational cultures and programs that engage volunteers will need to change in order to leverage the potential of this critical human resource.

The normative or traditional approach to volunteerism has not kept pace with these

social, economic and technological trends and the values of the new generation of volunteers. The traditional approach embodies and over reliance on, and perpetuates several myths: (1) that the community understands what your organization is all about; (2) that existing recruitment plans that have worked well in the past will continue to attract a new generation of volunteers; (3) that retention strategies such as annual recognition breakfasts will be enough to retain future volunteers and (4) that the marketing of “one size fits all” service opportunities such as bus drivers or low performing menial tasks will be sufficient to attract a new better educated, younger and highly individualistic volunteer. Organizational loyalty and brand name recognition, once a hallmark feature in the recruitment and retention of senior volunteers is less important to the new generation of volunteers. The resultant changes have insidiously eroded the once solid and dependable base of senior volunteers. A convergence of issues including an ever changing definition of retirement, a scarcity of young senior volunteers, increased competition for volunteers among organizations, governmental assistance with creating change in volunteer-based organizations compels us to rethink our traditional approaches to the recruitment and retention of volunteers.

The need for change is now, before the vast majority of baby boomers begin to consider retirement. Exactly how baby boomers might respond to the years normally correlated with retirement is as lacking in predictability as the cohort of boomers themselves. What we do know is that the boomers, as the next generation of retirees, are better educated, healthier and have more financial resources. Shaped by a variety of shared experiences (e.g., Vietnam War, Watergate, Civil Rights Movement,

Women’s Movement, Environmental Movement), baby boomers reflect distinct life values that directly impact their expectations about the future. They tend to be eternal optimists about the future exuding a “we can do anything,” spirit are individualistic in their personal pursuits, openly question authority, are reformers, and seek experiences that provide personal growth and adventure (Keefe, 2001). Volunteerism is not viewed as a stationary, end of life commitment to fill one’s free time. Retiring professionals now seek volunteer jobs as prestigious as their paying ones and want to participate in experiences that enhance and maintain their job skills (Tanz and Spencer, 2000).

The new generation of volunteers will expect more from their volunteer experience. Existing volunteer programs tend to focus on traditions and compliance, relying on individual and organizational loyalty. They often engage individuals seeking to volunteer in basic non-technical service-oriented tasks. Tried and true methods of volunteer recruitment have not changed significantly nor has there been large-scale innovation in incentives or retention activities.

To attract and retain the diverse group of potential volunteers that the boomers represent, diverse methods of recruitment and retention based on changing attitudes and emerging trends are needed. Developing innovative approaches which provide baby boomers with awareness of community-based needs while simultaneously responding to their own preferences for personal development and networking need to be tested now before the bulk of the boomer wave arrives.

One such innovative approach for recruitment and retention of the age 50+ volunteer has been implemented and tested over the last three years. The Leadership Institute for the Corporation for National

and Community Service and AARP (formerly known as the American Association of Retired People) with technical assistance provided by the university of Maryland Center on Aging. The Leadership Institute is based on the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. in West Palm Beach, Florida.

The Leadership Institute for Active Aging provides the format to develop and test innovative approaches for recruiting a new generation of professional volunteers to expand the scope of volunteerism among community-based organizations. The Institute model (a) integrates and utilizes the expertise of institutions of higher learning, (b) expands community capacity to provide increased services to seniors, (c) creates a sense of community and camaraderie among volunteers, (d) offers volunteers more flexibility and more options for community involvement, (e) provides an organized infrastructure to attract and train a continuous stream of volunteer leaders, (f) provides an environment for active healthy aging, and (g) engages the volunteer in life-long learning and community service.

Development of the Institute

The Leadership Institute for Active Aging created an advisory group to serve as a think-tank for program development by engaging the expertise of a broad spectrum of community partners. Membership includes community agencies, area agency advisory council members, volunteers, retired professionals, institutions of higher learning and area agency staff. This advisory group evaluated the merits of existing volunteer best practices, explored the reasons why service is not an attractive option for baby boomers, and assessed community need before choosing the Leadership Institute model.

As part of the planning process, considerable time was spent in carefully selecting a program name to attract a diverse group of participants and to create a marketing niche with broad appeal to the younger 50+ individual. Each word was designed to convey or impart a mental image to attract applicants and ultimately volunteers. The feedback from leadership institute students confirmed the significance of selecting a strategic name. The word “leadership” was attractive to those seeking an opportunity to reengage in meaningful work where they could apply their life-long professional and personal skills. The word “institute” signified continuous learning, a strong core value for the boomers and near boomers. The word “active” resonated with those individuals with those individuals who had become disenchanted with their retiree lifestyle of endless golf games and social clubs. The word “aging” is a time neutral term (versus elderly, older, senior) that progresses from birth and does not seek to designate a specific age cohort.

Three over-arching objectives were designed to determine the success of the Leadership Institute for Active Aging: (1) create a leadership model to expand community capacity to meet identified needs; (2) attract and retain experienced individuals through meaningful life-long learning and civic engagement activities and (3) ensure replicability.

The Leadership Institute for Active Aging model is a framework to offer volunteers more flexibility and options for civic engagement, and better utilization of their professional skills. The Institute is also designed to offer communities expansion of services to older persons in the community in support of independent living, and to strengthen collaboration among community organizations.

Recruitment of Participants for the Institute

The Leadership Institute accepts a total of 25 students per class. The application and screening process was intentionally designed to be competitive, mirroring the process of applying for a professional paid position. The first recruitment campaign netted over 75 applications attesting to the strength of the words “leadership,” “institute,” “active,” and “aging.” The ad in the local newspaper took a non-traditional approach to recruitment. It included words such as “learn and gain new skills,” “cost of tuition underwritten,” “a unique opportunity,” “want to become involved in your community” and included a picture of active individuals over age 50. Many applicants were retired professionals who wanted to apply their skills in a meaningful productive environment. They included retired CEOs, nurses, educators, marketing specialists, professional trainers and mid-level managers from various corporate sectors. An initial screening was conducted by telephone to ascertain the applicant’s suitability for the program and their commitment to community service. Applicants successful at this stage were sent an application and scheduled for a team interview with staff and members of the Leadership Steering Committee.

Applicants were not given a specific volunteer assignment at the beginning of their institute experience. Applicants were challenged to discover their own special gifts and abilities and to create their own unique market niche within the community service system. This allowed for individualism, a hallmark trait of the next generation of retirees. Applicants later revealed that they appreciated the intensive application and screening process, which signified the importance of the program, therefore adding value to the experience.

Another program incentive designed to attract the baby boomer generation and current retirees was that of partnering with local institutions of higher learning. The pursuit of life-long learning opportunities has broad appeal to those applying to the Institute. The partnership between the Area Agency on Aging and local institutions of higher learning provides benefits for both organizations. The Area Agency on Aging receives free space, access to instructors and assistance with curriculum development. The institution of higher learning receives access to a new market of students, is able to showcase its programs and services and can have a participatory role in community extension services. Leadership students readily embrace the higher education learning environment, making comments such as “I feel young again,” “I like being around the younger generation,” “its great going back to school,” and “I can’t wait to tell all my children and grandchildren that I’m going to college.” The higher education setting enhances the volunteer experience and further communicates the value to students. All classroom learning takes place on a college or university campus in the local community being targeted for both leadership recruitment and volunteer service delivery.

Leadership Institute Training Program and Curriculum

The Leadership Institute for Active Aging includes 80 hours of classroom training followed by a four-week internship in a community-based organization that focuses on the prevention and intervention of health related needs, the environment and social services. The intensive integration of life-long learning skills with meaningful service opportunities is intentional, designed to produce a committed long term volunteer who is more likely to engage in civic activities and community support services.

The program is based on the concept that volunteers who are highly knowledgeable concerning community resources, have a good sense of their own self worth, and who understand the dynamics of volunteerism are more likely to engage in civic activities and community support services. The program is based on the concept that volunteers who are highly knowledgeable concerning community resources, have a good sense of their own self worth, and who understand the dynamics of volunteerism are more likely to make an ongoing volunteer commitment to communities to expand and enhance service capacity. Students report that if the program had focused solely on traditional volunteer roles they would not have been interested. What they like about the Institute is that they play an active role throughout the process, are provided numerous opportunities to express their opinion, participate in various aspects of program design and are provided choices for volunteer opportunities.

Curriculum Development

The intent of the curriculum, which reflects the values of volunteerism and community service, is to be academically challenging, provide broad life-application and provide a forum among students for significant interaction that focuses on problem solving and community resources.

There are four categories of information in the core curricula. They are community resources, the aging process, self-worth and volunteerism.

- Community Resources provides information on navigating the aging network at the national, state and local level, the mental health community, program specific eligibility programs, local service matrixes, neighborhood based programs, local service matrixes, neighborhood based programs, long-

term care options and the role of civic organizations.

- The Aging Process engages students in learning about disease and disability issues, normal versus abnormal aging, care giving, elder sensitivity training, and prevention and intervention health issues.
- The Self-Worth track includes information on culture, diversity/competence issues, coping with loss, disengagement/reengagement theories, completing personal development profiles, understanding depression and affirmation of life-long learning.
- Volunteerism, the fourth core curricula area included leadership development training, conflict resolution skills, volunteer management, recruitment and retention strategies, understanding service impacts and outcomes and an overview of various organizational culture.

Interactive Learning

Active student participation is an essential part of the adult cooperative learning experience. Students work in teams on creative problem solving activities and other group exercises resulting in an enhanced understanding of leadership, team work and collaboration skills. These small group experiences create camaraderie among students and facilitate the importance of understanding different learning styles and the art of interpersonal negotiation. The Institute includes continuous exposure to knowledge about various community organizations and resources. This occurs on two levels: (1) students are advised of other community training opportunities and are encouraged to attend special conferences and seminars; and (2) representatives from community organizations are invited to

make presentations about their programs during the course of The Institute. Presentations from representatives of these organizations are interspersed throughout the eight-week curricula. As a result of their participation in the training, some service organizations requested that the Leadership Institute be expanded to allow their staff or volunteers to attend. Several organizations who have been recipients of Institute graduates have commented that the graduates of the Leadership Institute are better prepared to serve, and receive more intensive training regarding community resources and managerial skills than their professional paid staff. These comments reflect a gap in terms of service training and readiness by existing service organizations and presents new challenges and opportunities to develop expanded service models. A separate community capacity track or service readiness track would complement and strengthen the Institute model while simultaneously provide a valuable community service. This added component is under active consideration for further development.

Volunteer Internship

Internships are more often thought of as continuous learning opportunities for students completing an undergraduate or graduate program. The obvious intent is to provide the student a structured learning environment that allows them to actively apply their accumulated years of learning. Volunteerism should be no different. Providing the Leadership Institute students an active service learning internship is key to retention and high quality service. It also elevates, adds value and professionalizes the volunteer experience, which are important points in attracting the baby boomer volunteer. After eight weeks of classroom instruction, students become actively involved in community service by

completing a four-week internship program at a pre-approved community organization. Approved service organizations must designate a direct supervisor or coach, have pre-approved position descriptions, actively engage volunteers in the decisions making structure of the agency, provide a variety of service learning opportunities and provide volunteers the same opportunities for agency participation as that of paid staff. Students throughout their coursework are asked to consider where they want to serve in the community. A transitions coach is assigned to work with each student to help them determine their individual interests and then match those interests and skills with a local service organization. The coach follow them through their internship to assess the appropriateness of the match and to facilitate the communication process between the agency and the volunteer/student. Service opportunities can be categorized in three major areas:

- Community-based services: those organizations providing direct service opportunities such as respite care and adult day care;
- Career Transitions: those individuals seeking a seamless transition from work to community service and those wanting to reengage in the work force on a part-time basis may engage in activities such as volunteer generation, marketing and community organizing; and
- Mentoring: those wanting to participate in inter-generational activities. Students are asked to commit to providing between 15-20 hours of volunteer service each week.

Throughout the internship, students participate in reflective sessions that provide a forum for information sharing and peer collaborative problem solving.

Graduation

A graduation ceremony culminates the 12-week program. Family members, host organizations, the media, institutions of higher learning, and invited national, state and local representatives attend the graduation ceremony. Students vote to determine who will speak on behalf of the class at the graduation ceremony. Students who entered the program with little knowledge about community resources and civic engagement opportunities are now ready for service opportunities to meet community needs. Many students continue to serve in their internship sites while others develop new service activities. All are encouraged, beginning with their acceptance into the program, to make a sustained service commitment after graduation.

Outcomes

What does this model teach us about attracting and retaining a new younger generation of retirees? The answer to this question is best understood by asking three other questions: (1) Does a volunteer leadership model expand community capacity to meet identified needs? (2) Does combining life-long learning and civic engagement attract and retain experienced older persons? (3) Is this model replicable?

Does volunteer leadership model expand community capacity to meet identified needs? Through student exit interviews and program evaluation, we have learned that the word “leadership” evokes feelings of self-worth, transference of skills and the opportunity to shape the environment. This aspect of the model, as reported by the students was an integral factor in attracting and recruiting a high level professional volunteer. Students did not want to participate in the traditional roles often

ascribed to volunteers such as answering the telephone, stuffing mailing envelopes or other menial low skill tasks. This requires organizations wanting to tap into a new younger generation of volunteers to rethink and reframe their approach to volunteers and to assess internal paradigms of operation. Volunteers graduating from the Leadership Institute are seeking to participate in the life of an organization, have influence in the decisions that impact their responsibilities, be recognized as resources within the organization, be given the same respect and opportunities as other paid employees and perform in a way that the impact of their work is measureable.

The first four classes of the Leadership Institute for Active Aging graduated 92 volunteers. Those 92 volunteers provided nearly 43,000 hours of service to over 7,200 individuals in the community. Over 24,000 hours of service have been provided in direct service activities such as respite care, companionship, medical insurance assistance, and literacy tutoring. Approximately 19,000 hours of indirect service have been rendered, including community organizing activities, crime prevention, marketing, public speaking and intervention and prevention services. The overall financial contribution to the community is valued at \$660,661, based on the Independent Sector estimate of \$15.39 for the hourly rate or value of volunteer time (Independent Sector, 2002). Current projections are that by the end of the fifth year, 172,560 hours of service will be rendered in the community at an estimated value of over \$2,500,000. Future initiatives include a specific focus on volunteer generation training to further increase the number of volunteers and service hours performed, thus increasing the impact in the community.

Agencies recruited as placement sites for Leadership Institute graduates have

expressed high satisfaction with the quality, commitment and capacities of these volunteers. During the first three years of operation, regular meetings were held with placement agencies in order to obtain continuous quality assurance feedback about how best to make the Institute work for them. In a written survey and an in-depth telephone interview with a sample of 15 agencies, 85 percent were satisfied or very satisfied with their connection to the Institute. Agencies report that Institute volunteers have assisted them in increasing services, developing new and needed services, and increasing public awareness regarding services rendered.

The Institute graduates were interviewed by telephone twice for their response to the training and volunteering they have experienced. In keeping with the goal to expand community capacity, approximately 70 percent of the graduates for the first four classes went on to volunteer in community agencies after their internship. Those that did not go on were often deterred by personal illness or the illness of a family member. The average number of post graduation volunteer hours per month reported by Institute graduates was 47.

Does combining life-long learning and civic engagement attract and retain experienced older persons? The leadership model demonstrates that meaningful life-long learning opportunities are a strong factor in attracting and retaining younger retirees. Participants indicate the primary motive for attending the Institute was the opportunity to reconnect with others in a structured learning environment and to apply their paid job experiences to positively impact their community. The issue of volunteer community service was an extension of this learning experience but was not the initial primary motivation. Exit interviews revealed that if participants had only been told about

community service opportunities and the need for volunteers, most of them would not have been interested. The integration of a continuous life-long learning component that extends beyond the Leadership Institute has broad appeal to younger retirees and the baby boomer generation. Baby boomers, who represent the next generation of volunteers, are better educated than previous generations of volunteers and display a strong interest in education. In a study by Peter D. Hart Research Associates, 37 percent of older adults report that continuing their education is very important to them (Gardyn, American Demographics, November 2000). Once enrolled, the opportunities for community service and civic engagement were presented in an educational format. Students clearly stated that if the initial advertisement had focused solely on recruiting volunteers they would not have responded. To further validate the strength of the life-long learning connection, students were asked if the eight-week curriculum was too long. Their response was a resounding “no” with most resorting it could have been longer. The transference of the lifelong learning concept to volunteer programs will be essential in the future. It will not be enough to provide a one-time educational experience. Programs must find ways to integrate educational curricula throughout the life of the volunteer experience as an incentive for retention.

In a survey of the graduates, respondents were asked about their training.

- Forty-eight percent of respondents mentioned that the speakers of lectures were the best part of the training.
- Twenty-two percent reported that the learning about aging issues and resources in the community was the most useful part.
- Twenty-two percent reported that meeting new people and networking was important to them.

The majority of respondents said that the training adequately prepared them for the volunteer placement. When asked how the training could be improved, 24 percent of volunteers did not think that any aspect of the training needed to be improved. Site visits to community organizations providing support services to frail elders are interspersed with classroom experience. Volunteers were more likely to suggest having more field trips as a way to enhance training. Institute graduates are clear that volunteer organizations seeking to recruit them will need to create meaningful and challenging volunteer experiences. A redefinition and reframing of volunteerism that affords prospective volunteers opportunities to be engaged in meaningful civic and service activities similar to that of other paid professional staff needs to emerge in order to attract and retain a strong volunteer force.

Is the model replicable? The life-long learning and civic engagement model has broad organizational and community application. The strength of this model is in its flexibility and adaptability. The two concepts of life-long learning and civic engagement are the building blocks for attracting and retaining a new generation of volunteers. This model offers organizations the opportunity to reframe their message, rethink their programs and services matrix and create a marketing niche.

The organizational management and cost of implementing this model are flexible and responsive to individual organizational cultures. The Institute was developed with initial funding from the Corporation for National Service. A project director was financed through this method. The majority of the funds were set aside to pay a monthly cost reimbursement to each volunteer. Similar programs have been developed with a slightly lower volunteer time commitment

per month that does not include cost reimbursement. For example, volunteers participating in Senior Leadership Maryland, a program that embodies the life-long learning model and places seniors with elected legislative officials for 10-12 hours a week, receive no monetary compensation. These programs have also been successful in recruiting experience, motivated volunteers.

There was no cost for trainers and speakers, as many were community agency people or local college faculty who donated their time. Once the curriculum and program are developed, the greatest resource expenditure is on recruiting and working with both participants and agency placement sites. The Leadership Institute model could replace or enhance existing recruitment and retention activities with a volunteer coordinator assisted by a team of program graduates to achieve program cost containment once the program was in place.

Conclusion

The concept of combining life-long learning with civic engagement to attract and retain baby boomers is the gateway to innovative and successful volunteer programs. Baby boomer volunteers will be attracted to and will commit to sustained service that provides meaningful service learning roles coupled with continuous educational opportunities. Community capacity will be expanded to meet identified needs in a manner that maximizes scarce resources. The leadership Institute offers a framework and tools to leverage the resources of the younger retirees and baby boom generation to meet and expand community capacity. As a starting point, organizations replicating this model will need to rethink and reframe their volunteer and service opportunities message. Who are you trying to reach? What incentives are needed? What are the available community resources? How will you sustain the

program? Who will be the community collaborative partners? Once you have answered these questions, you are ready to invite other community partners to join you in thinking strategically about your community and its needs. Including ideas generated by community partners brings potential resources needed to sustain your program. One lesson learned in the development of this model was not to rush the planning and development phase. Organizations should allow at least six to eight months to complete the planning and development phase. It will be time well spent and ensures the essential buy-in from community partner. A network of community partners can provide strong operational support. We also learned the importance of simultaneously developing a capacity building track for prospective community host agencies. Organizations in the community may not be prepared to receive or provide adequate support for this type of high level volunteer. Educating host agencies about the goals and objectives of the program and involving them in the operational aspects of the Institute will reduce the frustration and barriers (e.g., paid staff feeling threatened by caliber of the volunteer who they may perceive as taking over their job; asking graduates to answer the telephone and make copies rather than engage them in meaningful roles) encountered by some earlier Institute graduates.

The future generation of age 50+ volunteers will expect and demand more from their volunteer experience. They

expect to be a part of the decision making process, they want flexibility that allows them to integrate paid and unpaid work, they want to engage in meaningful service learning activities, be afforded opportunities similar to those offered to paid staff and be able to transfer their professional skills to positively impact local community needs. Successful organizations seeking to harness the vast, yet untapped resources of age 50+ volunteers will need to reassess and think expansively and creatively about needs and service opportunities, strategically engage other community collaborative partners, and employ market driven strategies and incentives to attract and retain baby boomers and younger retirees as volunteers.

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