The contemporary challenges of volunteering in an ageing Australia

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ABSTRACT

This paper examines the changing policy and institutional environment facing older volunteers in Australia. It provides an overview of the current research evidence on volunteering by older people, which shows that they are an important resource to many non-profit organisations. Older people contribute much time and energy as volunteers, and in turn, there are health and social benefits associated with volunteering. These benefits are important in the light of Australian ageing policy which has focused on the economic and social concerns associated with demographic ageing, particularly as the large cohort of babyboomers begin to age. Ageing policy is beginning to shift towards the concept of healthy ageing, with recognition that volunteering can be an important and positive activity in later life. However, the role of non-profit organisations is critical here in ensuring that their practices and policies are non-discriminatory and that the tighter institutional environment does not work against older volunteers.

INTRODUCTION

In 1997, in line with the American literature, it was proposed that older people were a "rich resource" for nonprofit organisations in Australia (Warburton, 1997). Interest in older people as a source of volunteers was emerging because of the growth in numbers of healthy, active older people outside major paid work responsibilities. This led to the expectation that this sector of the population would have the time, the skills and the interest to volunteer. Over the past few years, the policy and institutional context surrounding both volunteers and ageing has undoubtedly changed dramatically. In particular, our knowledge and understanding of the demographics of population ageing has become more sophisticated, with the agenda dominated by a discourse of potential economic crisis. Similarly, our understandings of contemporary issues facing volunteers have also grown in response to a more complex and restrictive environment. This paper examines the impact of these changes on older volunteers in Australia. Here, we ask what are the contemporary issues facing older volunteers,

and how can non-profit organisations respond to these changes?

THE EVIDENCE BASE

Most of the research on older people as volunteers still emanates from the US, and is generally accompanied by a strong, supportive policy environment (Baldcock, 1999). In Australia, there has been much less research, as "volunteering as an activity has long been under-estimated, under-researched and under-valued" (Oppenheimer & Warburton, 2000, p.1; see also McDonald & Warburton, 2001). Similarly, in the ageing arena, there has traditionally been less research into the social dimension of ageing, with much of the research funding in ageing still oriented towards medical research into chronic diseases.

However, there is some evidence of a changing research environment, particularly in the volunteer arena. Recently, the Australian Bureau of Statistics (ABS) (1996; 2001) has begun to provide some base-

line volunteer data, and some researchers have used this database to undertake further analyses (eg Lyons & Hocking, 2000). In addition, a multidisciplinary research agenda is emerging, reflecting a growth in public interest in volunteering (McDonald & Warburton, 2001). The breadth of this agenda is reflected in the contents of the *Australian Journal on Volunteering*, the journal of the peak Australian volunteer body, Volunteering Australia. There are indications that researchers are beginning to see the strategic importance of volunteer research in Australia.

So what does this research tell us about older volunteers? We know that there are over half a million volunteers among those aged over 65 years, that older age groups generally volunteer less than those in the mid age groups, and that older volunteers are more likely to volunteer for community/welfare and religious organisations (ABS, 2001). Despite the relatively low numbers of older volunteers overall, further research has also shown that older volunteers are more likely to be highly committed volunteers (Lyons & Hocking, 2000; Zappala & Burrell, 2002). They give more time to their volunteering and stay with organisations longer. This makes them a cost effective source of volunteers, thus potentially a "rich resource" for organisations (Warburton, 1997).

As well as numbers and time commitment, there is also a growing evidence base around which groups amongst the older population volunteer, and why they do so. Volunteering has been associated with a range of socioeconomic variables, such as gender, social class, marital status, and religious affiliation (Warburton, Le Brocque, & Rosenman, 1998). In this context, it is important that these demographic differences are not seen as a source of exclusion (Warburton, Oppenheimer & Zappala, 2004). It also needs to be remembered that while many give their time as formal volunteers, many more give their time to their community, neighbours, and family as informal volunteers. In particular, it is important to highlight the contribution made to community by those from different cultural backgrounds, including Indigenous Australians (Kerr & Tedmanson, 2003). While this form of volunteering is not the subject of this paper, it is nevertheless an area where many older people contribute to society (Warburton, 2004).

In terms of motivation, a number of Australians studies have shown that older people volunteer for a mix of altruistic and self interested motives (ABS, 2000; Warburton et al, 2001). Studies have shown that the particular balance of motives varies by age group (ABS, 2001; van Willigen, 2000). Overall, the evidence suggests that older people are more likely to be motivated by altruistic concerns; they are also more likely to volunteer for social contact and to be active (ABS, 2001). Time is also an important consideration in relation to volunteering, as volunteering can be seen as a gift of time (eg Titmuss, 1970). It is also fundamental to the notion of older people as a social group with "time to spare" (Warburton & Crosier, 2001). Whether they choose to spend their time volunteering is, of course, dependent on a range of factors. Research suggests that, perhaps contrary to expectations, older volunteers may be looking for time flexibility and not wish to be tied down (Warburton et al, 2001).

Research has proposed that there may be certain barriers to involvement by older people. Organisations need to ensure that they encourage and support older people as volunteers, as well as attend to potentially ageist policies and practices. In addition, there may be individual barriers to volunteering, such as costs, access issues, or lack of transport (Paull, 2001; Warburton et al, 2001). Other personal factors such as poor health, and psychological barriers associated with lack of confidence or self-worth, can also act to self exclude older people from volunteer opportunities (Warburton et al, 2001).

Volunteering has been shown to have particular benefits for older people (Battaglia & Metzer, 2000). Service recipients benefit as does the community, from a generally more active civil society, but the evidence suggests that volunteers benefit as well (Wheeler, Gorey & Greenblatt, 1998). In particular, volunteering has been associated with better health outcomes. In a review by Onyx and Warburton (2003), it was shown that older volunteers are more likely to have better functional health, lower morbidity and mortality, better psychological health, and higher life satisfaction. It should be recognised, however, that these outcomes are also associated with higher socio-economic status, suggesting that it is also important to ensure that sufficient volunteer opportunities are also available for those who are less well off (Warburton et al, 2004).

In particular, the psychological benefits associated with volunteering have been noted as volunteering is associated with social connectedness, and with feelings of belonging (Battaglia & Metzer, 2000;

Musick, Herzog, & House, 1999). It permits older people to maintain a sense of identity and self-esteem when they are no longer able to obtain these from paid work (Battaglia & Metzer, 2000). Volunteers are also less likely to report feeling lonely or socially isolated, an increasing problem identified in older populations (Findlay, 2003). Finally, volunteering can help people withstand the losses associated with later life, such as through widowhood or retirement (Utz, Carr, Nesse & Wortmann, 2002). Thus, volunteering offers benefits to older people (Bradley, 2000).

As well as demonstrating that volunteering can have advantages for older people, research also suggests that there are benefits for organisations in having older people volunteer. As discussed, older people give more time, but they also bring a long life experience, and the skills and wisdom associated with this, to their volunteer roles (Freedman, 1997; Warburton, 2004). As well as benefits for organisations, there are also benefits to the broader community. Volunteer activities can be seen as the core of social capital, and there are important social benefits to communities rich in social capital (Onyx & Leonard, 2000). There may also be particular benefits associated with older volunteers, which include the passing on of cultural knowledge, combating social isolation and strong intergenerational relations (Warburton, 2004). Attempts have been made to cost some of these benefits. For example, an Australian study conducted by de Vaus, Gray & Stanton (2003) estimated that older people's non paid work activities contributed $39 billion per year to the economy (see also Ranzijn, 2001).

Thus, over the past decade, we have been developing our knowledge of volunteering in later life as a result of this growing body of evidence. We are also becoming increasingly aware that the involvement of individuals and social groups as volunteers is affected by the policy context. We thus turn our attention next to the challenges raised by a rapidly changing policy context surrounding both ageing and volunteering in contemporary Australia. As we examine this changing policy context, a number of important issues arise for the sector in recruiting, retaining and managing older volunteers.

THE POLICY CONTEXT

Along with most western countries, Australia is currently facing a range of challenges associated with population ageing (Australia's Demographic Challenges, 2004). This has led to concerns that population ageing will result in a social and economic crisis that will burden future generations (Intergenerational Report, 2002). Major reports such as these focus on the 'ageing crisis' and in particular, on increased costs to health budgets and the fiscal burden associated with declining numbers in the workforce. More recent policy developments are beginning to respond to these concerns by focusing on retaining older people in the paid workforce.

All of these policy developments have implications for older people as volunteers. First, the negative social context surrounding ageing has implications for both organisations and individuals. In particular, research suggests that older people are sensitive to a negative social context, and may be less willing to volunteer if ageing is seen as synonymous with dependency (Warburton et al, 2001). Second, if policies are implemented that are aimed at retaining people in paid work, older people may not have the time to volunteer or certainly the time to be highly committed volunteers.

Yet healthy and active ageing is a priority area for the federal government, which fits with the current policy framework. One of the five major planks of government policy reflected in the National Strategy on an Ageing Australia is that of "attitude, lifestyle and community support", reflecting active community living. It may be that this approach needs a more proactive and supportive policy environment.

While population ageing is currently being embraced by government policy, volunteers are also acquiring more strategic importance as part of the Commonwealth government's social coalition (Oppenheimer & Warburton, 2000). The voluntary principle could be viewed as an integral part of democratic societies or the 'glue' that holds society together (Oppenheimer, 2000; Cox, 1995). Despite their importance to a democratic civil society, there are almost no federal policies specifically relating to volunteering (Baldock, 1999).

Despite the lack of specific policies, there have nevertheless been a number of profound changes in the world of volunteering over the past decade (McDonald & Warburton, 2001). The non-profit sector is increasingly affected by a broad range of regulations, leading to a new institutional environment (McDonald & Mutch, 2000). There have been

a range of policies which are having a significant impact on both the sector and individual volunteers (ABC, 2004). These include occupational health and safety, risk management and legal liability (McGregor-Lowndes, 2003; Reynolds, 1999).

These policies impact on the sector generally and recent legislation which protects the volunteer rather than the nonprofit organisation may have the adverse effect of encouraging discriminatory behaviour towards a group or groups of volunteers who may be perceived as a greater risk. To date, Australia has perhaps neglected to protect the rights of volunteer workers to the same extent as it has paid workers (Oppenheimer, 2001). Certainly many non-profit organisations have to manage both paid and volunteer staff, and there are particular issues associated with an ageing workforce that may also apply to older volunteers (Steinberg & Cain, 2004).

Despite this complex environment, it may be that older people are central to notions of community and civil society (Ranzijn, 2001; Warburton, 2004). Older people have an important role to play as they often have both the experience to pass on and time to spare (Warburton, 2004). Thus, it is particularly important to recognise that these changes are impacting on both the sector and older volunteers themselves. This is the subject of the following section.

THE IMPACT OF CHANGE IN RELATION TO OLDER VOLUNTEERS

There are a number of issues relating to the contemporary policy context, which are likely to impact on older people as volunteers. Here, we discuss two broad areas of change. First, we look at changing models of volunteering within the current contemporary context, and the impact of this on older volunteers. Specifically, we look at the impact of institutional change on older volunteers. Second, we look at the rise of a new cohort associated with ageing, that of the babyboomers, how they might differ from other older cohorts, and the possible impact of this on volunteering.

CHANGING MODELS OF VOLUNTEERING

As was described recently in this journal (Warburton et al, 2004), the Australian non-profit sector is undergoing a process of rapid change. It has been suggested that this has led to the emergence of new models of volunteering which differ from the traditional or charity model that has traditionally dominated the sector (McDonald & Warburton, 2003; Zappala, 2001). Zappala (2001) has argued that the new or 'social enterprise' model of volunteering has implications across the volunteer sector, and has potential to impact on recruitment, volunteer activities, training, recognition, retention and staff relations. This new model also has implications for older volunteers.

In the current environment, organisations are experiencing pressure to move from a charity type model to a social enterprise model (Zappala, 2001). This move is the result of economic pressures affecting the sector, and has resulted in a growing trend towards the professionalisation of volunteers (Warburton et al, 2004). Traditional, unskilled volunteers in service oriented organisations may be both less needed and increasingly subject to external, regulatory pressures (Warburton & Mutch, 2000). They are more likely to be older people within the non-profit service sector (Warburton & McDonald, under review).

Research into the new institutional environment facing the non-profit sector suggests that there is a risk that older, more traditional volunteers may be excluded and challenged by the increasing demands associated with environmental change (McDonald & Warburton, 2003). There are many older people who are able to make the transition to the more professionalized, social enterprise model of volunteering. There is also a risk that many others may not be able to make this transition (Zappala & Burrell, 2002). Many older volunteers are working within the 'old' institutional order, by pursuing unskilled, charity-type work, such as food and hospitality, or shop work (Warburton & McDonald, under review). It is these traditional areas that are most affected by the new regulatory environment, such as health and safety, or risk management processes. The sector may struggle to weigh up the cost of legal compliance within these traditional areas against the social and economic value of the service. If the cost outweighs the benefit we may well see the erosion of large numbers of volunteer positions where, traditionally, older volunteers have been deployed.

Non-profit organisations need to consider some of these issues if they are to practice ethically. They have a responsibility to ensure that they manage

their traditional, older volunteers with care (Zappala & Burrell, 2002). If necessary, older volunteers should be provided with the skills necessary to contribute in the new institutional environment, and are not seen as unworthy simply on the basis of age. This involves ensuring that all volunteers are valued and that the diversity of volunteer activities is recognised. Just because people are older does not mean that they cannot provide much to the organisation and that their contribution should be either unrecognised or undermined (Warburton & McDonald, under review). Their organisational loyalty can perhaps be contrasted with the high turnover associated with social enterprise models of volunteering.

THE BABYBOOMER GENERATION

As the population ages, concerns mount as to the emergent population bulge that is beginning to hit retirement age. The new cohort of babyboomers, the generation born between 1946 and 1960, is expected to be less civic minded than the previous generation, which has experienced the direct effects of depression and world wars (Rotolo & Wilson, 2004). American studies suggest that overall there will be little differences in the amount of volunteering undertaken by both cohorts (Rotolo & Wilson, 2004; Harvard School of Public Health, 2004). The Harvard study suggests that the babyboomer cohort may volunteer less individually but the size of the cohort will offset any differences. Others (eg Gallagher, 1994) suggest that babyboomers may be less inclined to volunteer through formal channels and may be more likely to be involved in informal helping behaviours. Certainly it may be that with extended lifespans, babyboomers may be more likely to be caring for ageing parents than previous generations (Gallagher, 1994; Harvard School of Public Health).

Thus, overall, the numbers of babyboomer volunteers is not projected to decline. However, the research evidence suggests that the babyboomer generation will have different needs and expectations in their approach to later life (Harvard School of Public Health, 2004; Henkin & Kingson, 1999; Rotolo & Wilson, 2004). This will affect their volunteer activities, and may lead to different choices about where to give time (Rotolo and Wilson, 2004). They may be less interested in volunteering through a church or religious affiliation, and more interested in youth related volunteer work. They also suggest that the babyboomers may be more interested in community action volunteering, perhaps related to their participation in social movements during the 1960s.

The overseas evidence thus suggests that changes in volunteering will relate more to the type of volunteering rather than the amount. Australian based studies of the babyboomer generation also generally support these conclusions (Merkes & Wells, 2003; Dept. of Premier & Cabinet, WA, 2002; Heartbeat Trends, 2001). Some suggest that the numbers of older volunteers may increase, as workers scale back their paid work and move to include volunteering as one of their later life activities (eg Department of Premier and Cabinet, 2002). It also needs to be remembered that the babyboomer generation is not one homogenous group, and they will have different needs, motivations and expectations (Heartbeat Trends, 2001). It is important not to make too many assumptions based on age.

There are some general points that are important to note. Generally, the research evidence suggests that the babyboomer generation may not be content with volunteering for purely civic reasons, and may have greater expectations that their experience should provide fulfilment (Heartbeat Trends, 2001). All volunteers need to have their contribution recognised and appreciated, but there are some suggestions that this may be particularly important for the babyboomer generation (Zappala & Burrell, 2002). Certainly, babyboomers will have, increasingly, to be attracted to volunteering as a positive post-retirement activity, and attention paid to offering fulfilling volunteer roles. Volunteer recruitment and retention can thus be enhanced if organisations consider increasing the salience of volunteer roles (Smith, 2004).

Women, in particular, in this cohort will be more likely to have paid workforce experience and skills, which they may wish to transfer to the non-profit sector in retirement. Merkes and Wells (2003) suggest that women would be more likely to volunteer in retirement if they are already doing some volunteering and they were in excellent health. The continuity aspects of volunteering are very important, and organisations need to consider attracting people to volunteering while they are still in paid work (Department of Premier & Cabinet, WA, 2002; Merkes & Wells, 2003; Smith, 2004). As Smith (2004, p70) suggests, this would be "a prudent volunteer recruitment strategy". The WA report goes further

and suggests that waiting until the retirement years to recruit volunteers may be simply too late (Department of Premier & Cabinet, WA, 2002, p16).

Thus, volunteering in later life needs to be promoted as a flexible activity with a range of options, and part of a healthy and active retirement lifestyle. More sophisticated volunteer recruitment strategies perhaps need to be implemented (Zappala & Burrell, 2002).

DEVELOPING A RESPONSE TO CONTEMPORARY CHALLENGES

There is a growing evidence base of research into volunteering in later life, which highlights some of the contemporary challenges facing the sector. Changes to the volunteer environment within new institutional settings are important if organisations and volunteers are to benefit from their volunteer experience. This may be particularly important as a new, potentially more demanding cohort of older people, the babyboomers, become a new source of volunteers. These changes suggest an increasing need for strong, positive human resource management within the sector.

First, it is important to understand that older people are of course very diverse, and thus assumptions should not be made solely on the basis of demographic age. Diversity is important across a number of dimensions, and generally challenges us to be aware that the needs, experiences, and choices of older people vary. It is critical that this sector of the population is not stereotyped around mythical assumptions of ageing. The net result could well be ageism in organisational policies and practices.

Organisations have a responsibility to behave ethically, and to ensure that opportunities are available for older people. It is worth investing time and resources into training and supporting older people, because they generally give more time and remain with organisations longer (Warburton & Mutch, 2000). Using the Volunteer Investment and Value Audit (Gaskin, 1999) which puts a value on volunteer time in relation to the resources used to support volunteers, such as management staff costs, training and so on, shows that older volunteers are often a good economic investment for organisations. They are also a good social investment, offering much to organisations in terms of workplace and lifetime experience (Steinberg & Cain, 2004).

Older people need to be attracted to volunteering as a positive way of spending time. Positive marketing strategies, backed by strong supportive practices, are needed to appeal to a broader group of older people. Organisations need to adapt to the needs of the large upcoming babyboomer generation by ensuring that a sufficient variety of opportunities is available. Furthermore, volunteering needs to be promoted as an activity that competes favourably with other retirement activities, and as part of a healthy and positive lifestyle in later life (Paul, 2001).

As well as implications for the sector, there are also important policy implications here for government policy. This paper has focused on formal volunteering through the non-profit sector, however, it must also be recognised that many older people give their time to their community, neighbours and family as informal volunteers (de Vaus et al, 2003; Ranzijn, 2001). However, all these activities can be seen as volunteering and there may be a seamless connection between the two with people moving between them as they see the need (Cordingley, 2004). Older volunteers will continue to do what they do best, be it informal involvement at a neighbourhood level or through the more formal structure of an organisation. The totality of this contribution needs to be recognised in government policies on ageing to ensure a shift towards a focus on the potential of older people rather than their limitations (Healy 2004).

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