

**Transforming 50+ Volunteering –
A Literature Review and Strategy**

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Transforming 50+ Volunteering – Literature Review and Strategy

Introduction

As important as volunteering is as a source of crucial services, it's a great deal more than that. It's the means by which Canadians express ideals. It's an essential avenue along which many people connect with others. It provides the means for Canadians to fulfill their need to feel that they can make a difference... It is to community as a taproot is to a plant, perhaps: both indispensable as an anchor and as a source of vitality. But it's invisible, it's taken for granted and fragile. I believe that if we take our time as individuals and communities to respond to the changing face of volunteering there will be consequences. If we take a lot of time to respond I think there will be larger consequences.

– Paul Reed, senior social scientist at Statistics Canada.

Depending on who you listen to, the baby boomers – now in their late 40's through early 60's and moving toward retirement – will either be the saviours of volunteering in Canada or the cause of its demise. The voluntary sector has experienced great expansion in the past 40 or 50 years, with increasing government support, and a large volunteer contingent drawn from the veteran generation that was motivated by a creed of service and duty. Now, government revenues to the nonprofit sector are no longer increasing, the veteran generation of “super volunteers” are coming to the end of their volunteer years, and the bulge in the population known as the baby boomers are approaching retirement and represent a eventual bulge in the need for social supports provided by voluntary agencies. Everyone is asking, “Will Baby Boomers step up to the plate to provide the volunteer labour that supports these services?” And the answer appears to be a resounding “Maybe.” What is certainly clear is that these potential volunteers will not be interested in the same types of volunteer work done by their predecessors. The real question to be answered is whether volunteer agencies will be able to redefine their engagement with volunteers to make volunteering an attractive option to people who have different motivations for volunteering than those who came before them. The type of transformational change that will be required in the volunteer sector represents a paradigm shift for volunteering and to be successful will require wholehearted engagement from within the sector and substantial support from beyond it.

Literature Review

1. The Literature

Everyone agrees that continuing to engage the 50+ volunteer is going to require transformational change on the part of the voluntary sector. The baby boom generation are now in their late forties to early sixties. This group has redefined society at each stage of life and is poised to do so again as they enter their later years. What changes will be involved on the part of the voluntary sector is the subject of this literature review for Volunteer Canada and its partners. The good news is that Volunteer Canada is in a leadership position within the Canadian literature on this topic. The bad news is that there is not a lot of current material other than what Volunteer Canada has done. There

are three documents produced by Volunteer Canada that offer a good overview of the Canadian situation regarding volunteering and older adults. These are:

- *Volunteer Connections: New Strategies for Involving Older Adults*, 2001
- *Volunteering and Healthy Aging. What We Know*, by Neena L. Chappell, Ph.D., 1999.
- *Volunteering... A Booming Trend*. 2000. (Pamphlet)

Other Canadian documents that are of particular interest include:

- *Caring Canadians, Involved Canadians: Highlights from the Canada Survey of Giving, Volunteering and Participating, 1997, 2000, 2004*
- *Understanding Canadian Volunteers: using the National Survey of Giving, Volunteering and Participating to Build Your Volunteer Program, 2004*
- *Engaging 50+ Volunteers – A Resource Guide for Agencies, 2008*
- *The Graff-Reed Conversations: A Way-of-Life Wake Up Call for Canada's Communities, 2007*

The *Canada Survey of Giving, Volunteering and Participating*, published every three years by Imagine Canada, provides an opportunity to examine patterns and trends in Canadian volunteering over the life cycle. *Volunteer Connections* drew on data from the 2000 survey. Another document published by the Canadian Centre for Philanthropy together with Volunteer Canada, *Understanding Canadian Volunteers: using the National Survey of Giving, Volunteering and Participating to Build Your Volunteer Program* uses the 2000 data as well. This document has two short sections on senior volunteers (Understanding Volunteerism, and Recruitment), and refers to *Volunteer Connections* as a key resource. *Caring and involved Canadians: Highlights from the 2004 Canada Survey of Giving, Volunteering and Participating*, is the most recent version of the survey. Unfortunately, changes in the survey design make comparisons between 2004 and previous years impossible. *Engaging 50+ Volunteers – A Resource Guide for Agencies*, is the product of the Renaissance 50plus project which is just wrapping up at the beginning of 2008. The 35 page *Guide* provides information on governance, volunteer engagement, and recruitment. The Graff-Reed Conversations are available both as audio taped conversations between Linda L. Graff and Paul B. Reed, and as transcriptions of those conversations. Each conversation in the series is brief and to the point. Graff and Reed are concerned about the future of community participation and hence the future of Canadian communities. They see the decline in volunteering as a “way of life issue” with issues and solutions that are broader in their implications than the nonprofit sector itself (2007e, p. 1).

Literature from the United States, the United Kingdom, and Australia was also included in this literature review. While the literature from each of these countries address some issues specific to their situation, much of the material is applicable to the Canadian context and add to our understanding of the issues facing the nonprofit sector in recruiting and retaining 50+ volunteers. Mary V. Merrill, in the *International Journal of Volunteer Administration*, notes,

In the United States, Canada, Europe, Australia, and some Asian Pacific countries, demographic patterns reflect an aging population with the prediction that increasing numbers of people will live a third or more of their lives in retirement. This prediction, coupled with the large post World War II population entering retirement in the next decade, creates an emphasis on volunteer programs designed to not only serve but also engage retired and senior populations. (p. 11)

Among the literature of other countries, the United States stands out for the large amount of work done in the area of baby boomer and 50+ volunteers. There are numerous reports and several outstanding websites that provide information directed toward both recruitment and retention for non-profit agencies and volunteer opportunities and benefits for potential volunteers. Two websites that each contain a wealth of information for both organizations and potential volunteers are:

- Civic Ventures: www.civicventures.org
- The Resource Centre: <http://nationalservicerresources.org>

The Conference Board published a research brief and literature review in 2007 entitled *Boomers are Ready for Nonprofits But are Nonprofits Ready for Them?* This document, while focusing on the paid workforce, outlines issues of importance to volunteer opportunities and challenges. The report states that “Several experts in the field of civic engagement and aging note that retiring boomers may likely be looking for a mix of activities – combining paid work for an employer with volunteering for a different nonprofit organization” (p. 9). Several strong documents do focus on volunteering for the 50+ age group. Notable among these are:

- *Reinventing Aging – Baby Boomers and Civic Engagement*, 2003
- *Keeping Baby Boomers volunteering: A research Brief on Volunteer Retention and Turnover*, 2007
- *50+ Volunteering: Working for Stronger Communities*, 2004
- *Marketing Volunteer Opportunities to Baby Boomers: A Blue Print from the Field*, 2001

Reinventing Aging is a substantive, and commonly cited, document based on a conference sponsored by the Harvard School of Public Health-MetLife Foundation Initiative on Retirement and Civic Engagement in 2003. *Keeping Baby Boomers Volunteering*, authored by Foster-Bey et al., focuses on volunteer retention – an area of research that has received less attention than that of recruitment. *50+ Volunteering* is a handbook published by the Points of Light Foundation. The handbook is designed to support volunteer work by nonprofits, government, and businesses, with older adults. It contains information for programming and fundraising, recruitment, and retention. *Marketing Volunteer Opportunities to Baby Boomers* presents a framework for marketing volunteer opportunities developed from the Corporation for National Service Senior Corps Cluster conferences held across the U.S. in 2001. *Generations* is a publication of the American Society on Aging. The journal articles covered offer a more academic perspective on issues related to aging and volunteering.

The United Kingdom is also a source of significant current resources. Of note are:

- *The 21st Century Volunteer: A report on the changing face of volunteering in the 21st Century*, 2005
- *A Review of the Home Office Older Volunteers Initiative*, 2002
- *Active Ageing in Active Communities*, 2005

The 21st Century Volunteer (Evans and Saxton) identifies trends in volunteering and has a section devoted to engaging baby boomer volunteers. This document made frequent references to the Canadian literature. The Home Office review offers sections on motivation, barriers, training, and promotion of volunteering. It concludes with recommendations for organizations, government and private sector. *Active Ageing in Active Communities* (Justin Davis Smith and Pat Gay) reviews motivation, recruitment management and support, and looks at what works from both the organizations and the volunteers perspectives. Age discrimination and providing insurance for older volunteers were issues specifically addressed in the U.K. literature.

A frequently cited document from Western Australia is entitled *BOOMNET: Capturing the Baby Boomer Volunteers* (J. Esmond). This 2001 research project into Baby Boomers and Volunteering was designed to identify the motivations and barriers for baby boomers to volunteer, and to develop strategies to recruit and support baby boomers as volunteers. A second part to this research was published the following year to investigate what organizations were actually doing in terms of recruitment strategies aimed at Baby Boomers. The report, entitled *From BOOMNET to BOOMNOT*, found that “only one percent of organizations have put into action some form of recruiting approach specifically targeting Baby Boomers” (p. 25).

The material available on volunteering among older adults is extensive. The documents introduced above form the core of the literature included in this literature review as these documents are representative and many include reviews of other literature. A selected annotated bibliography is contained in Appendix A. And a full list of citations located during the literature search is contained in Appendix B. Both electronic and hard copies of all downloaded documents will be provided to Volunteer Canada for future use in the development of public resources as part of this project.

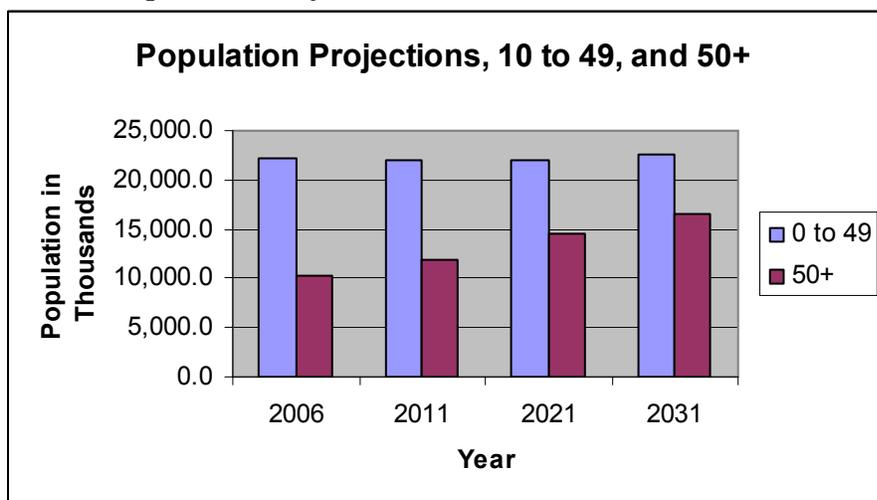
2. Canadian Demographics

Canada’s population is aging. Using a Statistics Canada ‘medium growth’ population scenario, seniors (65+) will become more numerous than children around 2015 – less than ten years from now (Statistics Canada, Catalogue no. 91-520). About one in thirty Canadians were 80 years of age and older in 2005. By 2031, this will increase to one in sixteen! Concerns have been raised about the drain that this aging population could pose on our social system as older people have generally required more assistance and health care. However, this population shift also represents a potential boom in citizens assisting in the maintenance of our social safety net. Currently the “super volunteers,” the small proportion of volunteers who donate large amounts of time, are older adults - many in their 70’s. A closer look at the population projections and volunteer trends will help us see possibilities that go beyond the stereotype of the “elderly” person requiring care.

Population Projections, 10 to 49, and 50+

Table 1 shows projected population growth over the next 25 years. The population that is 49 years of age and younger will remain stable, while the population 50 years of age and older will increase from 32% of the total population in 2006, to 42% of the population in 2031.

Table 1: Population Projections, 10 to 49, and 50+

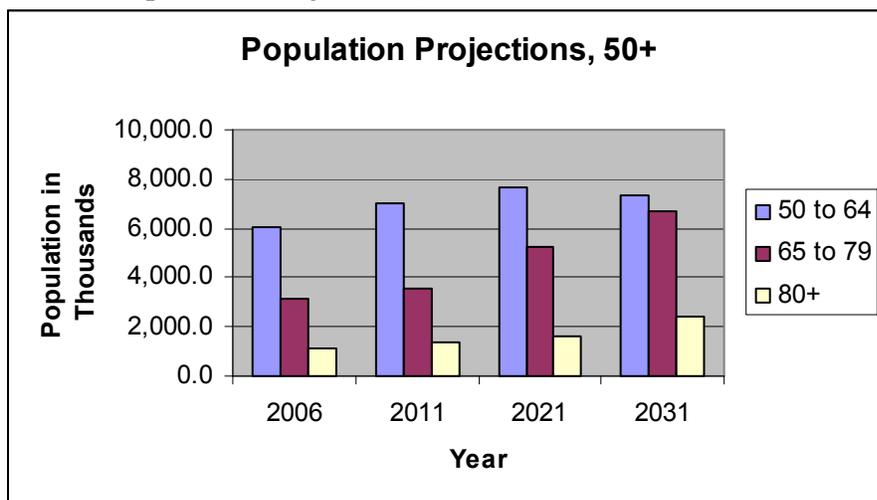


	2006	2011	2021	2031
0 to 49	22,211.8	22,019.9	22,025.3	22,560.7
50+	10,335.4	11,889.8	14,493.2	16,468.7
Total	32,547.2	33,909.7	36,518.5	39,029.4
% of 50+	31.8	35.1	39.7	42.2

Distribution of Growth Among the Population 50 Years and Older

Over the next 25 years, Stats Canada’s medium population projection shows Canada’s population growing by 6.48 million. Of that growth, most will be in the 65 to 79, and 80 plus age groups, as each of these groups more than doubles in size (112.2% respectively). However, the 80 plus group is proportionately much smaller than the two younger age groupings. These younger age groups – 50 to 64 and 65 to 79 will be a rich source of potential volunteers.

Table 2: Population Projections, 50+



	2006	2011	2021	2031	% Growth
All ages	32,547.2	33,909.7	36,518.5	39,029.4	19.9
0 to 49	22,211.8	22,019.9	22,025.3	22,560.7	1.6
50 to 64	6,029.7	7,006.8	7,646.5	7,332.1	21.6
65 to 79	3,149.5	3,551.5	5,232.4	6,683.3	112.2
80+	1,156.2	1,331.5	1,614.3	2,453.3	112.2

3. Patterns of Volunteering Over the Life Cycle

Caring Canadians, Involved Canadians: Highlights from the 2004 Canada Survey of Giving, Volunteering and Participating provides statistics relating to volunteering by Canadians. This document is based on a survey called the Canada Survey of Giving, Volunteering and Participating (CSGVP), which was conducted in 1997, 2000, and 2004. The 1997 and 2000 surveys revealed a trend toward a decrease in the number of volunteers. In 2004, changes in the survey questions led to a greater number of people seeing their efforts as “volunteering,” and thus the volunteer rate shows a significant increase between 2000 and 2004. The authors note that the results of the 2004 survey are not comparable to those of the 2000 and 1997 surveys. However, they suggest that while the magnitude of the shift is not comparable, the direction of the trend may be accurate:

The 2004 CSGVP recorded large increases in volunteering and giving. Extensive data quality analysis was undertaken... There is evidence to support the *direction* of the trend. However, changes in questionnaire content and collection methodology, coupled with a relatively low response rate, and a changing awareness in the Canadian population of the importance of volunteering may have contributed to the *magnitude* of the trend. (p. 74)

The next CSGVP may provide more insight into the longer term direction of volunteer rates. However, whatever the next survey may show in terms of these changes, the 2004 data do confirm other concerns within the sector. The 2004 data show that there is a small number of volunteers doing the majority of the work. Many of these volunteers are about to retire from volunteering. Engaging the next generation – the baby boomers – will likely require different approaches. Linda Graff, a long time consultant in the nonprofit sector notes that her experience working with organizations shows an ongoing trend toward an increasing difficulty in recruiting volunteers – even among those organizations which have in the past had a surplus of volunteer assistance. She locates this problem as one of organizations not responding to generational changes within the population (Personal communication, January 10, 2008).

Statistics distilled from the 1997, 2000, and 2004 surveys are presented in Table 1. This table shows a 2004 volunteer participation rate among Canadians 15 and over of 45%. The percentage of people who volunteer generally goes down with age (55% among the 15 to 24 year olds, and 32% among those 65 and older). At the same time, the average number of hours goes up (139 for youth to 245 for seniors). Most age groups contribute in line with their proportion of the population, with the exception 25-34 year olds whose participation rate is lower than other groups (Table 3). These comparisons within age groupings are consistent for earlier years of the survey as well as 2004.

Table 3: Canadian Volunteer Statistics, 1997, 2000, 2004*

	1997	2000	2004*
Total Population – 15 and older	24,808,000	24,383,000	26,093,000
Total # of volunteers	Nearly 7.5 million	Over 6.5 million	11.809 million
Participation rate - Aged 15 and older	31.4%	26.7%	45%
Total hours volunteered	1,108,900	1,053,200	2,000,000
Average annual hours per volunteer	149	162	168
Top Volunteers		5% of volunteers contributed 34% of total hours 25% of volunteers contributed 73% of total hours	4.5% of Canadians (10% of volunteers) contributed 52% of total hours 11% of Canadians (25% of volunteers) contributed 77% of total hours
Volunteer rate by age			
15-23	33%	29%	55%
25-34	28%	24%	42%
35-44	37%	30%	51%
45-54	35%	30%	47%
55-64	30%	28%	42%
65+ participation rate	23%	18%	32%

**2004 data is not comparable with 1997 or 2000 data.*

Table 4 shows volunteering characteristics by age group for 2004. For the 45-54, the 55-64, and the 65+ age groups, the % of total volunteer hours given (20%, 15%, 16%) is slightly more than the percentage of the population that each group represents (19%, 13%, 15%). Together these groups represent 47% of the population and provide 51% of the total hours contributed by volunteers. The volunteer rates for these groups (47%, 42%, 32%) are generally as low or lower than other age groups, while the average hours volunteered (177, 202, 245) are significantly higher. This is reflected in all three age groups providing a higher percentage of the hours volunteered by top volunteers (20.8%, 15.6%, 16.8%), than other age groups in relation to their volunteer distribution in the population (19%, 13%, 15%).

Table 4: 2004 Volunteering by Age Category

	% population distribution of volunteers	# of top volunteers as a % of total population	% of total hours contributed by top volunteers	% of hours volunteered by top volunteers
15-23	17	2	12	15.6
25-34	17	1	9	11.7
35-44	20	2	15	19.5
45-54	19	2	16	20.8
55-64	13	2	12	15.6
65+	15	2	13	16.8
			77 % total	100% total

	Volunteer rate	Average volunteer hours	% of total volunteer hours
15-23	55%	139	17
25-34	42	137	13
35-44	51	152	20
45-54	47	177	20
55-64	42	202	15
65+	32	245	16

Other relevant points from the 2004 *Caring Canadians, Involved Canadians* (p. 31 – 41) are presented below:

- 25% of volunteers said they volunteered as part of a group project with members of their immediate families
- 20% of volunteers said they used the Internet in some way during their volunteer activities
- 8% used the internet to seek volunteer activities
- 50% of volunteers provide 1 to 60 hours per year (7% of total hours volunteered); 10% provide 417 hours or more (52% of total hours volunteered)
- 50% of volunteers volunteer with only one organization
- 74% of hours volunteered by individuals go to one organization
- Highest average hours are given to organizations that relate to: religion, politics, sports, culture, social services
- Those with higher income are more likely to volunteer but tend to give less hours
- Likelihood of volunteering increases with education
- Those who are employed are more likely to volunteer but give less hours on average
- Those with children do more volunteering
- Those who attend weekly religious services are more likely to volunteer (62% vs. 43%)
- Immigrants are less likely to volunteer (41% vs. 48%) but give the about the same number of average hours (165 vs. 168)
- Those who arrived in Canada before 1967 have a very similar pattern of volunteering to native-born Canadians
- Immigrants volunteer more with religious organizations; less with sports and recreation
- Quebec experiences the least volunteering among the provinces

- Looking only at the organizations to which volunteers gave the most hours –
 - 55% of these volunteers did not approach the organization
 - 89% were asked to volunteer - 69% of those by someone in organization, 20% by a friend or relative outside the organization.
 - 5% were asked by their employer
 - 6% were approached by someone else
 - 45% approached the organization – they responded to an advertisement (16%), or an appeal on television or radio (3%), made contact on the internet (2%), or were referred (2%).
 - Those who were asked gave a higher number of average hours – 144 hrs (asked), versus 108 hours (initiated contact).
- People have a variety of reasons for volunteering: to make contribution (92%); use skills (77%), affected by cause (60%), explore strengths (49%), network (47%), friends volunteer (43%), religious (22%), improve job opportunities (22%).

The Canadian data show Canadians of all ages actively involved in volunteering. However, the volunteer rate does decline with age, while the number of hours volunteered increases among those who continue to volunteer. This has led to a concern that volunteer managers are relying on a decreasing, and aging, volunteer contingent (often referred to as “super volunteers”), who are doing increasing amounts of work. In 2004, 25% of the volunteers contributed 77% of the hours. Many of these top volunteers are in their 70’s and may be reaching a time where they will have to decrease their volunteer involvement.

In keeping with the Canadian data, *Keeping Baby Boomers Volunteering* suggests that “Volunteering tends to peak for adults in mid 30s to mid 50s and then decline for adults 60 and older” (p. 5) This is reflective of higher volunteer rates for those with children in the home. However, baby boomers have had children later and, “Boomers may hit their peak volunteer years later in life compared to past generations and could maintain high volunteer rates at a much older age” (p. 6). The document suggests that “We could substantially miss the full volunteer potential of Baby Boomers if we do not focus on how to keep them volunteering. It is possible to be very successful in recruiting new volunteers but have the Baby Boomer volunteer rate remain stable or even decline” (p. 7).

The article “Patterns of Volunteering Over the Life Cycle” (Selbee and Reed) which appeared in *Canadian Social Trends* in the summer of 2001, concurs that with *Keeping Baby Boomers Volunteering* about the general patterns but also notes that “a complex interplay of factors encourages or inhibits volunteering depending on the combination of an individual’s life cycle circumstances...Religion makes a difference for some, while education and income do not affect the pattern in any consistent or pronounced way...higher rates of volunteering are fairly consistently associated with higher levels of community participation of various kinds” (p. 6).

4. How the Aging of Baby Boomers will Affect Society

The baby boomer generation, the oldest of whom are turning 60 and the youngest of whom are currently in their mid-40s, have redefined many of society’s norms as they have moved through life.

Their relative wealth, higher education levels, and life expectancy, suggest that they have the resources to redefine aging as well. *Reinventing Aging* suggests that boomers “have the potential to become a social resource of unprecedented proportions... This possibility offers a way to reframe public discussion about the implications of the aging baby boom, shifting the focus from the frailty and dependency long associated with old age to an image of active, productive aging that comes with improved health and longevity” (p. 8). The Report cautions that simply replacing the image of the frail elder with one of never-ending youth is not the answer. What is required are more complex understandings: “New language, imagery, and stories are needed to help boomers and the general public re-envision the role and value of elders and the meaning and purpose of one’s later years” (p. 5).

Another concern regarding the aging of the baby boom generation is the movement of knowledge out of the workforce as baby boomers retire. This potential “brain drain” has been the subject of much apprehension. However, as is true with other aspects of their passage through life and society, baby boomers appear to be reshaping the pattern of ever earlier retirement found through most of the 20th century. The emerging pattern is one of an extended work life into retirement years. Phyllis Moen (2007) argues that the “full-time education-employment-retirement lockstep convoy of time... is outdated, having emerged from twentieth-century policies and practices that do not match up with twenty-first century realities of an older workforce, a growing educated and healthy retired force, and millions of boomers on the cusp of moving from being workers to being retirees – but wanting something different” (p. 32). She suggests that many people are now looking for more flexible arrangements that provide them with a combination of challenging work, leisure, community service and spiritual renewal. So far these arrangements have primarily been available only through individual negotiation.

Moen argues that nonprofits could obtain a competitive advantage by undertaking the structural adjustments that would allow them to offer these flexible arrangements in a systemic way. Workers that are faced with the choice of full-time work or retirement are as likely to choose retirement, taking a host of skills out of the workforce with them. *Keeping Baby Boomers Volunteering* notes that workers who leave the workforce also leave behind the contacts that engage them with the community, which can lead to less volunteering (p. 12). This suggests that creating opportunities for flexible work arrangements could benefit nonprofits both in retaining paid workers and in recruiting volunteers. However the report cautions that, “while some evidence exists of the link between reduced work hours and increased volunteering, the evidence compiled for this report does not seem to support this conclusion for volunteer retention... Indeed, increasing work hours seems to slightly increase Baby Boomers’ and older volunteers’ propensity to be retained as a volunteer” (p. 12). Given the current environment of full time work *or* retirement, the trend to later retirement “could translate into higher volunteer retention and volunteering rates for older Americans” (p. 13).

5. The Relationship Between Volunteering and Health

A 1999 paper by Neena Chappell, Ph.D. for Volunteer Canada entitled “Volunteering and Healthy Aging What We Know” discusses the relationship between volunteering and health. She notes that, “The volunteer literature provides... evidence that those who volunteer receive health benefits from this activity. What we do not know is the extent to which selectivity operates, that is those for whom

volunteering is beneficial continue to volunteer, and those who are in good health to begin with, are the ones who volunteer” (p. ii). More recent documents appear to be more forthright in claiming the benefits of volunteering on health:

“A recent study by the University of Michigan (2002) indicates that people who volunteer may strengthen their overall health and longevity. The study found that people who were helpful to others reduced their risk of dying prematurely by nearly 60 percent as compared to their peers who provided no such support” (*Reinventing Aging*, p. 113).

Two articles were reviewed that specifically address older volunteers and health issues. The first article, “Volunteerism Among Older People with Arthritis” (Barlow and Hainsworth, 2001) presented the results of a research project to examine the motivations of 22 older volunteers in Britain (mainly women of white/European origin) who were training on become lay leaders of an arthritis self-management program. As the numbers of older people in Western societies increase, the incidence of chronic disease and the need for chronic disease management will increase. “Given that the benefits of volunteerism extend to both the giver and the recipient, building upon the life experiences and skills of those older volunteers who live with chronic illness, is one step toward addressing this issue” (p. 205). The study reported three key motivating needs: “to fill the vocational void left by retirement, to feel a useful member of society by helping others, and to find a peer group” (p. 213). The volunteers who participated in the study were “able to overcome losses caused by retirement and decline in health and had redefined their role in society” (p. 213). The report notes in the concluding paragraphs that “the type of structured volunteerism targeting older adults, in which recipients become helpers, has policy implications” (p. 215), but does not discuss what these implications are. This article brings forward issues of mutual aid. *The 21st Century Volunteer* argues that “more needs to be made of the interconnectedness between the volunteer and beneficiary and that elements the beneficiary brings to the table should be better promoted (p. 21).

“Older Disabled Workers’ Perceptions of Volunteering” (Balandin et al., 2006) looked at volunteering among those who are over 45 years of age and work in supported employment in Australia. The study was a response to concerns that “when these workers retire they will lose access to meaningful daily activities or opportunities for social participation in the community” (p. 678). The study concluded that there is an interest in volunteering among older disabled workers currently in supported employment, and that the “motivation... expressed... was no different from that of other older people” (p. 658). “Volunteering could provide meaningful activity, particularly after retiring” (p. 689).

6. Emerging Trends in Volunteerism

Linda Graff is a consultant, author, and trainer in the nonprofit sector. In a 2002 article that summarized the results of extensive interviews with a small number of North American experts, she identifies a number of trends and issues in volunteerism that are “expected to influence and transform volunteerism throughout North America over the next decade” (p. 2). The most important is the trend toward episodic volunteering, which she argues is “the most significant and substantive shift in volunteering, both at the present time and into the foreseeable future” (p. 3). Organizations seem to be aware of this shift, but it also appears that the volunteer sector may be “relatively slow to integrate new knowledge about volunteerism into system changes” (p. 19). More volunteers looking

for episodic commitments means that long term volunteers are harder to find. People are busier and often have more resources and therefore more choice in how to spend their time. “A key learning is that volunteering will need to become much more attractive if it is to compete with all of the other demands and attractions in people’s lives. Creativity and “outside the box” thinking are required in volunteer position design. The traditional work done by long-term volunteers is simply not attractive to today’s episodic volunteers” (p. 5). Trying to fit volunteers looking for short term commitments into jobs designed for long term volunteers will be at best a trying experience for volunteers, staff, and clients and at worst a cause for long-term failure of the volunteer initiative.

Graff identifies several other issues as well. Changing demographics, as noted elsewhere in this paper, are a potential cause of volunteer shortages, and of changing expectations from volunteers for a volunteer experience that can be seen as time well spent. New sources of volunteers are emerging, including mandated community service, corporate volunteer programs, and family volunteering. Technology is creating new opportunities for volunteering and volunteer management that are being underutilized within the voluntary sector. One caution in the use of technology is for recruitment. The report notes that “the ‘anonymous ask’ of the ‘Net may be a particularly ineffective method of recruiting” (p. 8). Risk management is identified as an increasingly prominent issue as organizations are doing increasingly complex and serious work, and volunteers are participating in that work. Tensions between volunteers and paid staff were also noted as there may be a gap between staff beliefs about volunteers and who volunteers ‘should’ be, and what volunteers are and can be. The trend to short-term volunteering may assist in alleviating resentments that sometimes occur among staff toward the volunteer role.

Responding to these trends successfully will require vision and commitment from the leadership of organizations. Volunteers should be considered an integral human resource at all levels of the organization, including program design. Volunteers are also likely donors to the organization – “the volunteer resources department should be closely connected to the resource development department” (p. 12). Volunteer management is a professional role requiring a specific skill set, but is often under-resourced, without the time to keep current with the field. “Increasingly more volunteers are having less than stellar experiences, and we may be losing them to volunteering forever due to poor management, unattractive jobs, and improperly planned and implemented “mandatory service” programs” (p. 13). Volunteers want to be connected to the larger cause and know that their efforts have made a difference. Recruitment requires a well thought out process that targets specific market segments. Responding to the changing needs will require being able reconceptualise volunteer roles.

To increase the effectiveness of job design, the experts recommend doing a full review of the work of the organization and considering where volunteering could be useful; thinking carefully about the margin between what it costs to find and keep volunteers involved against what volunteers return through their work; developing positions that are attractive to volunteers and where the “return margin” is the greatest (p. 14).

Organizations are developing new roles for volunteers within this changing context, as they are increasingly brought to understand the value that volunteers add to the work done by the organization. However Graff notes that “most respondents alluded to a kind of gap or ‘disconnect’ between an apparent understanding on the part of the organization of what it takes to have an effective volunteer program and what one respondent described as a “deer caught in the headlights look” when it comes to making it happen” (p. 17). The respondents also noted the importance of staff training in the areas of what volunteers can do and what it takes to create a healthy volunteer

program. A final point stressed the importance of a national level voice within national organizations to ensure visibility, accurate understanding of resource requirements, and clear and standardized policy.

Linda Graff worked with Paul B. Reed in 2007 to create the *Graff-Reed Conversations: A Way-of-Life Wake-Up Call for Canada's Communities*. This is a series of five conversations with an introduction that are available in audio and print format on their website, "CanadaWhoCares.ca". Graff and Reed see a fragile and shrinking volunteer base of a "tiny group of committed Canadians carrying the bulk of the responsibility for services, for caring, and for the nurturing of community life" (2007b, p. 2). The majority of this group are older and in fact are aging. They have buffered the effect of a decline in volunteering, but that may soon change. Paul Reed (2007c, p. 3) notes several other shifts that he sees:

- Toward caring and direct helping as an individual rather than through an organization.
- From being focused in the area of responding to social needs to greater contribution of time to activities concerned with amenities (toward sports organizations and away from soup kitchens)
- A particular difficulty in small communities in finding volunteers (although large cities have the lowest rates of volunteering)
- Difficulty in recruiting for leadership positions such as Boards of Directors

Graff and Reed make the case that volunteering is not perceived to have the integral importance that it actually has to our communities (2007d). They suggest that the problem "is not a volunteering problem. It's a community problem, it's a social problem, it's a way of life issue" (2007e, p. 1). They believe that the mayors of communities, the chambers of commerce, the United Way, community foundations, companies, and the private sector should all be concerned, and suggest that "changing the lens, changing how we think about things" is essential to the solution. Graff says, "I think there's an awareness fix. I think that if we got an awareness of what volunteerism was about, the fix would happen naturally" (2007d, p. 3). That awareness would include an understanding of the "implications of having many fewer volunteers ... spread across our entire society" (p. 3). Finally, in the last conversation, Graff and Reed (2007e) make a number of suggestions for organizations:

- "Organizational leaders need to understand the importance of the work volunteers do in their own organizations" (p. 1).
- "We need to build infrastructure under volunteer programs, infrastructure that allows volunteering to be productive and rewarding" (p. 1).
- "Organizations need to redefine the role of volunteers... we've offered them the most routine, repetitive work... at the same time we've reserved the innovative and creative work for paid staff. We may need to rethink the division of labour between paid and unpaid and look for new ways to make the very best use of all the resources available to us" (p. 1).
- "We're going to need to shift the architecture of volunteering. I hear agencies say... all the time: we can't recruit volunteers. I don't think there's an organization in the country that has a recruitment problem; what they've got is a job design problem" (p. 2).

Graff and Reed also identify two key challenges for communities:

- "Community organizations and civic leaders must persuasively demonstrate how and how much volunteering makes a difference... this matter of making the case for volunteers is sorely needed and long overdue and is a necessary basis for action" (p. 2)
- "The second initiative we're suggesting can be called community conversations – community conversations about volunteering in fact. These should entail people from every quarter and

corner of their respective communities assembling to pool ideas for volunteering specifically in their community (p. 2).

7. Motivations and Barriers to Volunteering

Motivations for volunteering appear to be different among the baby boom generation and those following than for the preceding generations. Prisuta suggests that "... boomers are less likely... to volunteer out of a sense of duty, obligation, or religious commitment, although religious institutions remain a primary focus of volunteer activity (*Reinventing Aging*, p. 51). And Johnson states that, "...investigations have shown that boomers still dream of making a difference, that they want numerous options of ways to do so, and that they expect these opportunities to be professionally managed and offer incentives that speak to their own personal and economic needs (*Reinventing Aging*, p. 108). For those who are retired, "an important driver... is the chance to regain meaningful identity and relationships, particularly if combined with the opportunity to put existing skills to use" (p. 110). For those still working, time is a precious commodity, and well-managed volunteer programs can fill the desire for effective use of that time, as well as the desire to make a difference.

The 50+ population are sophisticated consumers who have come to expect an abundance of options encompassing everything from cereal to places of worship... they have an acutely defined sense of their own needs and preferences, as well as of what they have to offer and spend. Not only do boomers expect a wide menu of volunteer options to choose from, they increasingly find that time is their most limited commodity" (*Reinventing Aging*, p. 109)

Baby boomers are a racially and ethnically diverse population. This diversity suggests that, "volunteerism will be more informal, unstructured, and focused on the extended family than has previously been the case. The community focus of most volunteering, coupled with the diversity of communities in terms of both the incidence of boomers and the capacity to support volunteerism, will be a factor as well" (*Reinventing Aging*, p. 86).

BOOMNET: Capturing the Baby Boomer Volunteers, notes that "an enormous amount of unpaid work [is done in Aboriginal communities], but it is undertaken on an informal basis rather than a formal basis through any organization" (p. 33). A community member notes, "We don't really call it volunteering in our community... what happens is that the most stable member or members of the family will help out all the others... it's their responsibility and they haven't got time for anything else outside" (p. 34). The researchers also undertook interviews with paid staff working in ethnic-based organizations which supported this understanding of the situation within ethnic communities. Using definitions of volunteering which only include organization-based activities will miss increasing amounts of volunteer work in communities where informal volunteering within the community is the norm.

There are many potential barriers to becoming a volunteer or volunteering more. "Some of the more typical examples, which often hold true across demographic lines, include transportation issues, menial tasks, lack of job descriptions, and unclear impact" (*50+ Volunteering*, p. 18). *50+ Volunteering* highlights three issues as most significant: time constraints, lack of promotion, and inadequate volunteer management. Regarding time constraints, the report suggests that many 50+ adults are caring for both parents and children or grandchildren, have "additional options for

leisure,” and live in a “busier world.” Many may also experience economic challenges that form barriers to volunteering (p. 18). In the 2004 CSGVP “did not have time” was the most frequent reason for not volunteering more (73%) among volunteers, or for not volunteering (67%) among non-volunteers (p.44). Bressler and Henkin (2004) reported on results of a regional initiative to increase civic engagement among people 50+ in an article entitled “Understanding What Older Adults and Baby Boomers Want from Volunteer Experiences”. They note, “Barriers to volunteering included the cliquishness of organizations (especially for men in female-dominated agencies), stressful assignments, insufficient time, personal demands, health issues, transportation, disorganized volunteer management and feeling disrespected by staff” (Abstract).

8. Recruitment

The message is reiterated throughout the literature:

Boomers today are entering their later years with a broad range of skills, talents’ and experience - as well as with a set of attitudes, expectations, and needs that is decidedly different from previous generations. Harnessing those skills, and accommodating those expectations, will be critical to solving a wide range of social problems in the years ahead. To attract Baby Boomers to volunteering, experts on aging agree that nonprofit groups and others must boldly rethink the types of opportunities they offer- to “re-imagine” roles for older American volunteers that cater to Boomers’ skills and desire to make their mark in their own way (*Keeping Boomers Volunteering*, p. 2).

The 2004 CSGVP notes that among volunteers 15 years of age and older, “Over one-quarter... (27%) indicated that they did not volunteer more because no one had asked them. More than one in ten indicated that they did not know how to get involved (13%); cited the financial cost of volunteering (11%), and slightly fewer indicated dissatisfaction with a previous volunteer experience (7%)” (p. 44). Non-volunteers reported a lack of time (67%), and an inability to make a long term commitment (58%) as their top reasons for not volunteering. Forty nine percent said that they gave money instead of time, and forty percent said that they did not volunteer because no one had asked. Many of these reasons for not giving more time can be addressed by agencies in their recruitment plans and job design.

The literature reviewed for this paper is replete with ideas for recruitment and retention of volunteers. A notable example is that of the *Strategy for Positive Aging in Nova Scotia*, (2005). This Strategy was “the result of a year-long process that involved more than 1,000 individuals from caring communities across Nova Scotia” (p. 4). The report notes that “our ability to provide positive aging in Nova Scotia will increasingly depend on the economic and social strength of our communities. Our ability to mobilize community support will depend on the strength of our volunteers and on the ability of not-for-profit organizations to attract and retain them” (p. 57). Goal 9 – the Supportive Communities Goal is: “Seniors have opportunities for personal growth, lifelong learning, and community participation in safe and supportive environments. The Goal is supported by nine objectives related to volunteerism, four related to older adult education, four related to rural issues, five related to safe communities, two related to leisure activities, and seven related to working together (p. 58-60). Part three of the Strategy presents “Good Ideas”, highlights of “innovative initiatives that have been undertaken in other jurisdictions,” designed to stimulate creative thinking.

9. Retention

“...relatively little attention has been paid to ensuring that those who choose to volunteer one year continue to do so the next.... Despite their reputation for self-centredness, Baby Boomers today have the highest volunteer rate of any age group. They also... volunteer at higher rates than past generations did when they were the same age. Because three out of every ten Boomer volunteers choose not to volunteer in the following year, a key aspect of keeping Boomer volunteer rates high is to learn how to retain existing Boomer volunteers” (*Keeping Baby Boomers Volunteering*, p. 2)

Keeping Baby Boomers Volunteering analyzes American data on “the volunteer habits of the same sample of Baby Boomers over two consecutive years, as well as a similar sample of pre-Boomers” (p. 2). The study found that 3 out of every 10 Boomers who volunteered in the first year dropped out in the second year. This presents a problem for organizations as volunteer turnover imposes costs similar to that of employee turnover, including recruitment, placement, training, and relationship development. The study also found that recruitment generally falls short of replacing these volunteers: “On average, only 83.2 percent of the volunteers who chose not to continue were replaced with new volunteers” (p. 3). The report argues that the insights and tools that are used for retaining employees would be appropriate to use with volunteers. Similarly, those used to retain donors could be useful (p. 4).

The report examines several possible explanations for variations in volunteer retention. First is high attachment to volunteering. Volunteer attachment can be seen in the proclivity for those who work the most hours to have the highest retention rates, while those who work only episodically or with the smallest number of organizations have the highest attrition rates. “One could argue that there is something of a virtuous circle that encourages those who commit the most to volunteering to commit more” (p. 9). The fit between interest and position also affects retention, while certain positions also are related to higher volunteer retention rates. For both Baby Boomers and older volunteers, positions that require more skill such as professional or management activities have the highest retention rates, while general labour or supplying transportation attract the lowest retention. However, there is some variation in the concerns or issues which attract these two groups. Retention rates are higher for Baby Boomers in volunteer activities related to music and performance, and are higher for older volunteers who are engaged in making and distributing clothing or food. This suggests that for “community programs that primarily provide volunteer opportunities that appear to be less attractive..., it may be imperative to consider strategies for making these activities more attractive to Boomers or to reconsider how they will utilize volunteers” (p. 11). Thirdly, changing family status and work commitment are significant life changes that can disrupt volunteering. And finally, how one comes to volunteer also has significant impact on maintaining a volunteer commitment. Becoming involved on one’s own initiative led to the highest retention rates. Of those asked to volunteer, those that were approached by someone in the volunteer organization had the longest commitment. Those approached by their employer had the shortest. This is consistent with CSGVP data that showed that those who became involved on their own initiative gave more hours than those who were asked (144 hours vs. 108) (p. 40).

Keeping Boomers Volunteering suggests five ways to increase volunteer retention (p. 14):

- Keep volunteers engaged. “Volunteer managers should focus on finding ways to cultivate greater interest and involvement among existing volunteers... the more time a volunteer spends volunteering ... and the more activities a volunteer is involved with, the more likely she or he is to keep volunteering”

- Develop commitment to volunteering among those who already volunteer. Volunteering tends to increase for up to five organizations, yet 63% of volunteers only volunteer with one organization.
- Take into consideration the implications for retention of the types of activities and locations offered. Promote the more attractive volunteer opportunities, and look for ways to increase long term commitment.
- Differentiate between “using the workplace as a venue for volunteer recruiting and making volunteering a work commitment.” Someone who feels pressured in any way, is less likely to make a long term commitment.
- Remember that “anything that pushes up volunteer retention rates among any groups will increase overall volunteer rates.” The “donor model” of volunteer retention would relate volunteering time to making donations, and give a similar priority to encouraging a sense of connection to the organization and its mission among volunteers as that given to donors. The “employment model” looks at volunteers as a “key resource and an integral part of the organization’s success.”

Enhancing Volunteerism Among Aging Boomers, a background paper that forms part of the *Reinventing Aging* report, emphasizes the importance of volunteer retention, suggesting that “most boomers favourable to volunteering are already doing so... efforts to further engage boomers would be most successful by focusing on maintaining the involvement of current boomer volunteers... extending current involvement or using current organizations and activities as a bridge to others have the greatest potential for success” (p. 51).

10. Meeting the Challenge

The baby boomers who are now in their late 40’s through 50’s, represent a huge resource to communities as they will have many active years after the traditional retirement age of 65.

Reinventing Aging notes:

Three major conclusions from this report will help realize this vision: (1) large-scale efforts will be needed to mobilize boomers to contribute their time, skills, and experience to address community problems at the local level; (2) many organizations that utilize volunteers will require substantial retooling if they are to attract and retain boomer volunteers; and (3) the news media, the advertising industry, and Hollywood can play key roles in helping society rethink the meaning, purpose, and status of the older years (p. 41).

It appears that up to this point, the voluntary sector has not successfully met the challenge represented by this changing demographic. *50+ Volunteering* states that, “the articulation of a new vision for later life that includes challenging and dynamic volunteer opportunities is outpacing the construction of programs and institutions needed to realize that vision... without additional resources directed toward building the capacity of community-based organizations to utilize this potential tidal wave of volunteers, 50+ adults may find themselves ‘ready and willing’ with nowhere to go” (p. 7). Linda Graff (2007g) echoes this concern:

Nonprofit organizations continue to offer the same kinds of routine, maintenance, ongoing and administrative volunteer opportunities. Veteran-era volunteers filled those positions largely from a sense of civic duty rather than personal satisfaction. Boomers are less likely to be so selfless. Evidence is mounting that boomers – and younger volunteers as well – want interesting, growth-producing, mission-linked, productive, high-level, high-impact work

that allows them the freedom to apply their high skills and influence. They want short term work, flexible schedules, and convenient work locations, including for many, the opportunity to do as much as possible online. Contemporary volunteers will not take on the routine, maintenance functions like fundraising, event planning, chapter/branch maintenance, board and committee work that their predecessors (bless them!) have been doing” (p. 2).

The voluntary sector must create a new paradigm of volunteering – one that responds to the realities of the contemporary volunteers referred to by Linda Graff. This new paradigm must be understood and embraced by staff within voluntary organizations, and the transition must be resourced by those who support volunteer organizations.

Boards of directors, executives, administrators, and work forces are accustomed to responding to the exigencies of the moment (political, cultural, or economic), through established, tried-and-true routines and behaviours. For this reason, some observers have suggested that leadership for change must come from outside existing organizations if anything more than incremental adjustments are to be achieved (*Reinventing Aging*, p. 31).

However, *Reinventing Aging* also points out that “there is a compelling rationale for building a new infrastructure on the foundation of existing institutional loyalties and capabilities... older adults are far more likely to retain established memberships and affiliations... and more likely to respond to appeals that come from institutions that they know and trust” (p. 31). The report suggests that a strategic response to these two conflicting imperatives would be for new organizations, which are developing within the new paradigm, to form partnerships with older organizations “with practical experience and engendered trust and loyalty” (p. 32).

Direction for volunteer organizations is provided by *Marketing Volunteer Opportunities to Baby Boomers: A Blue Print from the Field*, by Laura B. Wilson and Jack Steele. This ‘blue print’ was the result of the work of over 300 project directors and sponsoring organizations in a series of conferences held by the Corporation for National Service Senior Corps in 2001. The findings are reported under seven categories:

1. *Organizational strategies that might need to change.* (i) to change the image of aging; (ii) to repackage the way volunteer opportunities are presented; (iii) to place new emphasis on the needs and characteristics of the future volunteer; (iv) to plan new approaches to find volunteers.
2. *Ideal organizational structure.* (i) changes in power structure to reflect the importance of volunteerism (ii) identification of a volunteer career ladder; (iii) remove barriers by creating a flexible and broad range of opportunities; (iv) better ways to integrate the existing agencies into societal structures already attractive to boomers (e.g. bringing volunteering to workplaces); (v) create adequate and permanent feedback systems for volunteers and recipients.
3. *Organizational resources needed.* (i) new sources of funding; (ii) demonstration grants; (iii) awards for innovation. Using the best available technology, and corporate and community partnerships were identified here and also form their own sections.
4. *How technology can be used.* (i) need for adequate hardware; (ii) use of internet for clearinghouse of opportunities; (iii) use of technology related incentives such as free email accounts; (iv) recruitment of technology experts as volunteers.
5. *Role of Funders.* (i) corporate partnerships seen as essential; (ii) matching funding interests with boomer capabilities (e.g. volunteers could make link with funders based on their demonstrated capacity); (iii) impact evaluation seen as an important tool, both as a volunteer role and as a way to attract volunteers.
6. *Change/Expansion of organizational partnerships.* (i) new ways to work with business including corporate-sponsored volunteer vacations, release time for current employees, employee

volunteer sabbaticals, and fee for service benefits using volunteer program services as an expanded benefit for employees; (ii) new partners included collaborations for life learning which would benefit agencies, corporations, volunteer training partnerships, and service club partnerships. (iii) use of neighbourhood and grassroots organizations.

7. *Changes in organizational culture and values.* (i) more flexibility and customization in volunteer opportunities; (ii) creation of seamless format for moving between volunteer and paid workforce opportunities; (iii) increased responsiveness to diversity.

Questions were raised in the conference sessions about organizational readiness to effect these changes. Changes and training would be required at the board and staff level in order to make the required shifts. The authors of the report also noted that participants “were creative and comprehensive in their input to the blue print... they knew what needed to be done but were less sure how to effect federal or institutional shifts which would facilitate the change process. Training and technical assistance as well as a plan which allows for phasing in change over a specified period of time would help to ameliorate concerns” (p. 18).

Responding to the Challenges – The Strategy

Volunteering affects every aspect of Canadian society – a healthy voluntary sector is essential to our well-being as a nation. The preceding literature review suggests that a transformation of thinking about volunteerism is required within Canada’s voluntary sector for that sector to continue to thrive. A *status quo* approach to volunteerism will not maintain the volunteer levels that have sustained our communities to this point as changes in lifestyle, expectations, demographics, and relationship to community service, have been dramatic over the past several generations. Changes will be required to engage not only the 50+ volunteer, but every volunteer.

“The structures and mechanisms that will tap the potential of the aging boomers to serve as a resource to the community have yet to evolve” (*Reinventing Aging*, p. 32). A response that is successful in engaging both voluntary organizations and the 50+ volunteer will rely on the combined efforts of a large variety of stakeholders. *Reinventing Aging* provides a listing of eleven essential participants: policymakers, national nonprofit organizations, local nonprofit institutions, employers, local governments, faith-based institutions, special interest clubs, educational institutions, Hollywood, and news organizations (p 39). Below, the roles of Volunteer Canada, the volunteer centres, volunteer-involving organizations, and business community, are explored further.

Voluntary Organizations

Transformational change requires a willingness to step “outside the box.” This entails the potential for great benefits but also the risk of failure as a step in the learning process. It also requires greater resources (at least in the short term) than continuing to “do it the way that we have always done it.” The literature suggests that organizations who continue to use tried and true methods of volunteer recruitment and retention are going to find themselves in a position of ever diminishing returns. The literature also suggests that many volunteer managers recognize that changes are needed, but are limited in their capacity to initiate these changes because of under resourcing. Volunteer managers may even find it difficult even to keep up with the trends and issues in the field. The above suggests

that even voluntary organizations that may be open to redesigning volunteer opportunities would find themselves without the resources to develop the necessary initiatives within the current environment. The role of voluntary organizations will include several aspects:

- ***Engaging in the larger conversation.*** Voluntary organizations who don't make the transition to engaging the "new" volunteer represented by the 50+ and Baby Boomer populations may miss the "wave" and find themselves unable to catch up. Organizations can keep the awareness of this new reality front and centre, by participating in the conversation about the needed changes with other agencies. How can this conversation be initiated and maintained?
- ***Developing a readiness to change.*** A key factor in the transition will be the engagement of staff in a new relationship with volunteers. And one of the most important aspects of creating change within an organizational environment is delivering the message that a change is needed, *and* that it will be happening. A staff and volunteer contingent who understand and are engaged with why change is necessary, and how it will assist the organization to accomplish its mission while supporting employees and volunteers to do their jobs, will be better prepared to weather the uncertainties and insecurities that come with change. There are a variety of ways that organizations can develop their change readiness. Some examples from the literature are: using volunteers as researchers to keep the organization up to speed on trends, engaging the Board of Directors with emerging trends and issues, being willing to explore individual volunteer arrangements that are outside of "the way we do things" as practice for and to generate learnings about how volunteer roles could be redefined, and assessing barriers to the participation of 50+ volunteers. How could resources be made available to support this work?
- ***Working together.*** Perhaps the resources available to organizations to move themselves beyond an awareness of the need to change can best be put to use through partnerships. The Renaissance 50plus *Resource Guide for Agencies* suggests that "It is up to agencies to work together, share our lessons, and give volunteerism a good image" (2008, p. 30). What is needed to resource and maintain these partnerships?
- ***Using new projects to explore the changing conceptions of volunteering.*** Many organizations use project funding to pilot new initiatives. Ensuring that project proposals respond to volunteer trends will provide organizations with the opportunity to explore the needed changes. Funders must also be aware of these trends in order to respond appropriately. How can project funding be directed toward addressing the issues involved in engaging the 50+ volunteer (and those who will come after)?
- ***Development of the "next generation human service centred organization."***(p. 8). *Marketing Volunteer Opportunities* suggests that this next generation will be "an organization effectively structured to attract and retain baby boomer volunteers" (p. 8). Restructuring will require changes in every aspect of the organization, from organizational structures, to the role of funders, relationships with partnerships, an improved use of technology, and organizational culture and values.

Volunteer Canada

Volunteer Canada is an essential resource for our country to have in place during this transition. It is clear that individual organizations cannot afford to undertake this work on their own. Nor would it be desirable – collective action and shared learnings will provide a much more efficient and effective platform for this work. The Volunteer Canada website states, “Volunteer Canada provides leadership on issues and trends in the Canadian volunteer movement.” Volunteer Canada, in initiating this strategy development project, is creating the ground work for a clear understanding of the monumental changes required within the voluntary sector in how the volunteer role is envisioned. This is a necessary first step, but only a first step. Volunteer Canada’s role will have several components:

Transforming our understanding and language related to volunteering:

- ***Spearheading the development of a new vision*** of volunteering within the Canadian voluntary sector that responds to needs and interests of the 50+ population. Today’s (and tomorrow’s) volunteers are looking for short-term engagements that give them an opportunity to make a difference, and a sense of having made good use of their time and skills. This requires an emphasis on volunteer management, job design, and the use of technology to support episodic volunteer involvement that has not been present in the past – an emphasis that is in line with Volunteer Canada’s three core tools: the Code for Volunteer Involvement, and job design and screening resources. Many people within the voluntary sector may see the need but have not been able to fully engage in the changes required as of yet. How can Volunteer Canada support the voluntary sector to develop what this new vision requires of them?
- ***Engaging the 50+ population with this new vision.*** The 50+ population is a diverse group with wide ranging skills and experience. Engaging them with a new vision of volunteering will require that they be part of the development of the vision as well as marketing the vision to them. The literature suggests that the term ‘volunteering’ conjures up images of duty and repetitive tasks, while 50+ volunteers tend to be motivated by a connection to the mission of the organization as well as personal development. New language as well as new concepts are required for this new vision: *50+ Volunteering* (p. 15) suggests, “Don’t seek volunteers; seek activists working to propel a movement.” The 50+ population is technologically savvy and technology may indeed be useful in engaging them with the new vision. How can the approaches that will engage this group be developed with them and disseminated to the larger public?
- ***Ensuring that informal volunteering is visible within the new vision.*** Informal volunteering is more the norm for those who make their volunteer contributions within their extended families or communities. Many of these “volunteers” would not conceptualize what they do as volunteering. A trend toward informal volunteering is also identified by Paul Reed as part of a “very subtle movement among Canadians to distance themselves away from public institutions” (p. 3). What is the role of informal volunteering in relation to voluntary organizations?

Volunteer Centres

The Volunteer Canada Website states:

Volunteer Centres are non-profit organizations or groups dedicated to fostering and developing volunteerism in the community as a whole. Today there are more than 200 Volunteer Centres in Canada each providing common services as well as a unique mix of programs to fit the needs of the community.

Volunteer Centres engage in four general kinds of activities:

- Promoting volunteerism and raising awareness of the power of service
- Building capacity for effective local volunteering through management consulting on volunteer programs and training of volunteers and managers of volunteer resources
- Providing leadership and advocacy on issues relating to volunteerism and volunteer programs
- Connecting people with opportunities to serve through recruitment and referral of volunteers to community agencies

The volunteer centres have an essential role to play in the development and dissemination of the new vision of volunteering and in assisting voluntary organizations in making the required transition. “Agencies will need incentives and guidance to create new initiatives that engage boomers, as well as continued technical and financial support to sustain and expand model programs (*Reinventing Aging*, p. 119).

Providing leadership to organizations going through the required transition toward the “next generation human service centred organization” identified by Marketing Volunteer Opportunities. Such leadership is needed in the following areas:

- ***Generating a ‘buzz’ to engage organizations in the conversation.*** Keeping the need for, and direction of, change in people’s minds is an important step toward engaging people in action. When organizations hear that others are taking the coming changes seriously, when they hear of successful initiatives, and begin to generate enthusiasm within their own organizations, they are motivated to begin working on change themselves. How can this ‘buzz’ be generated?
- ***Resources for volunteer managers.*** There is a great deal of information available on the changes necessary to engage and retain the 50+ volunteer. However, organizations and their volunteer managers may not be keeping as current with the trends and issues in their field as they would like to because of time constraints. How can these resources be made easy to find, understand, and act upon?
- ***Programs that generate innovation.*** Encouraging organizations to take the risk of developing new programs will require funding support for pilot projects. Beyond funding, bringing a new vision to an existing program may require different skills than those the organization has available internally. How can “breakthrough” results be achieved? Could projects be developed across organizations, requiring less input from each one?
- ***Funding for program review and redesign.*** Nonprofit organizations are generally without the resources to undertake the redesign of programs that are working now (even if there are signs of an ominous future). Can new funding be developed to support these initiatives?

- **Supporting the replication of effective practices and model programs nationally.** The shift within voluntary organizations can best take place through sharing information, ideas, experiences, and effective practices. How can voluntary organizations be best supported to learn from and with each other?
- **Promoting 50+ volunteering.** Volunteer Centres also play a public role in promoting volunteering. What new conceptions of volunteering are needed to attract this new generation of volunteers?

Business Community

The business community, as a significant sector of our society has an interest in, and a part to play, in this transition. Preparation on the part of the business community to respond to the changing interests and needs of baby boomers can support volunteering by this population on several fronts:

- **Flexible work arrangements.** Phyllis Moen suggests that baby boomers will be looking for a combination of challenging work, leisure, community service and spiritual renewal. There are indications that Boomers will work longer into their “retirement years” and in doing so will be looking for work opportunities that are challenging and use their skills but not all of their time. Some research has suggested that reduced work hours could leave more time for volunteering, but other research has contested this conclusion, suggesting that increased work hours increase volunteer retention. Either way, there does seem to be consensus that workplace contacts can be a source of community engagement and lead to volunteering. Baby Boomers will, as they age, be looking for more flexible work arrangements in order to continue to participate in paid employment.
- **Funding for Innovative Programs.** *Redefining Aging* suggests that the costs of redesigning volunteer programs may be too great for the sector to absorb. “With limited places for agencies to pursue funding for their existing programs, along with concerns about the sustainability of new initiatives, it is critical that foundations, government, and corporations support not only current community needs but also fund innovative programs that leverage future human and financial resources to address social problems” (p. 119).
- **Workplace Volunteering.** Workplace volunteering includes both group projects undertaken by staff teams and paid time given for volunteer efforts of staff in the community. Workplace volunteering is becoming increasingly popular as it “... allows companies to better their communities while simultaneously building employee teamwork skills, building morale, improving corporate public image, and meeting strategic goals” (*Reinventing Aging*, p. 106). As retirement patterns change, there is also some interest within corporations in thinking about retirees as part of their corporate citizenship efforts (Gonyea and Googins, p. 78). The workplace can also be a place for organizations to recruit volunteers for their programs.
- **Promoting Volunteering.** The health benefits and the essential role of volunteering in maintaining a healthy civil society are well documented in the literature. The business community has a number of avenues for promoting volunteering – through funding and

employee efforts, as noted above, and through promotion of volunteering to customers and through business organizations.

Products and Services to be Developed

How does one support a normative change such as that currently required within Canada (and other countries) toward volunteering? Normative change by definition calls into question the norms that we commonly accept as givens. To look *at* our usual lens for viewing the situation, rather than *through* that lens is indeed a substantive undertaking. In order to make transformational or normative change we first need to understand that what feels to us as “normal,” “the way things are,” or even as “necessary” is in fact the result of choices that have been made along the way; choices that can – and must – be changed. Secondly, we need to envision what our new choices might be, and a consensus is needed on a new direction or vision. Once we have our new direction we need plans and resources to enact the changes required.

Volunteer Canada and its partners are taking on a big job in initiating this work. Following the steps outlined above, we begin to see an outline of the tasks involved.

1. **A social marketing campaign** can be the means to instil among civic leaders, the business community, and the public, a keen appreciation for the importance of volunteering to the very substance of who we are as Canadians, as well as the threat to volunteering if paradigmatic changes are not made. We, as a society, must understand and accept the need for change before significant forward momentum can be generated. Including the potential benefits to individuals and to society in this message will be essential to engage people in the process. Engagement with leaders on the threat to the sector, the required transformation, and the immense contributions to civic and community life if this transition is made, is needed to generate the resources necessary for the work to be done.
2. **Community conversations to generate possibilities and a new consensus.** Graff and Reed suggest that we need community conversations across Canada to generate ideas at the local level. These conversations should also challenge current stereotypes about what volunteering is and generate new ideas and support for what volunteering could be. *Reinventing Aging* echoes this concept with the addition of “specific actionable projects that address community problems” as outcomes of the gatherings: “One way to mobilize volunteers is to bring people together through public forums, bridging class, generational, and cultural lines to create a broadly supported agenda for civic action. Boomers should be involved in such discussions now, to foster a sense of ownership and begin to plant seeds among those who are exploring alternatives for their own futures” (p. 40). The report suggests that the convenors of these forums could be post-secondary institutions, interfaith organizations, business coalitions, or existing civic organizations.
3. **Planning and resource development.**
The voluntary sector needs support to move through the resulting paradigm shift toward the new consensus. *Marketing Volunteer Opportunities to Baby Boomers* presents a “blue print” for action that includes seven areas of change (as outlined in the last section of this report): organizational strategies, structures and resources, technology, the role of funders, partnerships and culture and

values. Each of these areas represents a challenge in itself; taken together they represent a transformation of voluntary organizations. Volunteer Canada may work with the Network of Volunteer Centres to provide leadership through the transition. The Volunteer Centres may then in turn work with voluntary organizations. Support to organizations in undertaking this paradigm shift can take the form of face to face meetings, web-based events or resource materials that can be accessed by volunteer managers and others in their own time, but also needs to be more active, in order to move organizations from awareness to action.

Conclusion

The literature in the field of 50+ volunteering is vast, and the literature review contained in this report was of necessity the barest scan of what is available. However, the report does present what is hoped to be a useful overview for Volunteer Canada and its partners as they further develop a strategy for the project. Further research could “drill down” in the topic areas presented in this report, in terms of the roles of various stakeholders, in the literature of specific geographic regions, and in strategies being used or proposed elsewhere and the range of initiatives that support those strategies.

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Volunteering... A booming trend: Experience Personal Fulfillment and Satisfaction Later in Life Through Volunteering. (2000). Ottawa: Volunteer Canada.

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APPENDIX A
Annotated Bibliography of Selected References

50+ volunteering; working for stronger communities (2004). Washington, D.C.: Points of Light Foundation.

50+ Volunteering is a handbook produced by the Points of Light Foundation designed to support volunteer work by nonprofits, government, and businesses, with older adults. It contains information for programming and fundraising, recruitment, and retention.

Attention Boomers: Change the world... again! A toolkit to meaningful volunteering (2008). Ottawa: Catholic Immigration Center.

Attention Boomers is a new resource (still in production) for potential volunteers.

Balandin, S., Llewellyn, G., Dew, A., Ballin, L., & Schneider, J. (2006). Older disabled workers' perceptions of volunteering. *Disability and Society*, 21(7), 677-692.

"Older Disabled Workers' Perceptions of Volunteering", looked at volunteering among those who are over 45 years of age and work in supported employment in Australia. The study was a response to concerns that "when these workers retire they will lose access to meaningful daily activities or opportunities for social participation in the community"

Barlow, J. (., & Hainsworth, J.). (2001). Volunteerism among older people with arthritis. *Ageing and Society*, 21(2), 203-217.

"Volunteerism Among Older People with Arthritis" presents the results of a research project to examine the motivations of 22 older volunteers in Britain (mainly women of white/European origin) who were training on become lay leaders of an arthritis self-management program.

Boomers are ready for nonprofits: But are nonprofits ready for them?(2007). U.S.: The Conference Board.

This document, while focusing on the paid workforce, outlines issues of importance to volunteer opportunities and challenges. The report states that "Several experts in the field of civic engagement and aging note that retiring boomers may likely be looking for a mix of activities – combining paid work for an employer with volunteering for a different nonprofit organization" (p. 9).

Caring Canadians, Involved Canadians: Highlights from the 2004 Canada Survey of Giving, Volunteering and Participating Statistics Canada: Ottawa.

Caring Canadians, Involved Canadians provides statistics relating to volunteering by Canadians. This document is based on a survey called the Canada Survey of Giving, Volunteering and Participating (CSGVP), which was conducted in 1997, 2000, and 2004. The 1997 and 2000 surveys revealed a trend toward a decrease in the number of volunteers. In 2004, changes in the survey questions led to a greater number of people seeing their efforts as "volunteering," and thus the volunteer rate shows a significant increase between 2000 and 2004. The authors note that the results of the 2004 survey are not comparable to those of the 2000 and 1997 surveys.

Chappell, N., L. (1999). *Volunteering and healthy aging: What we know*. Ottawa: Volunteer Canada. "Volunteering and Healthy Aging What We Know" discusses the relationship between volunteering and health.

Civic Ventures. (2007). *Ten ways your organization can realize an experience dividend*. Retrieved November 22, 2007, from <http://www.civicventures.org/publications/articles/TenWays/TenWays-10.cfm>
A website featuring significant resources for both organizations and volunteers.

Engaging 50+ volunteers - A resource guide for agencies(2008). Ottawa: Catholic Immigration Centre.

Engaging 50+ Volunteers – A Resource Guide for Agencies, is the product of the Renaissance 50plus project which is just wrapping up at the beginning of 2008. The 35 page *Guide* provides information on governance, volunteer engagement, and recruitment.

Esmond J. (2001). *'BOOMNET': Capturing the baby boomer volunteers*. Perth, Western Australia: Department of the Premier and Cabinet.

This 2001 research project into Baby Boomers and Volunteering, was designed to identify the motivations and barriers for baby boomers to volunteer, and to develop strategies to recruit and support baby boomers as volunteers.

Esmond, J., Ph.D. (2002). *From 'BOOMNET' to 'BOOMNOT': Part two of a research project on baby boomers and volunteering*. Western Australia: Department for Community Development. This report forms a second part to BOOMNET and was designed to investigate what organizations were actually doing in terms of recruitment strategies aimed at Baby Boomers. The report, found that "only one percent of organizations have put into action some form of recruiting approach specifically targeting Baby Boomers" (p. 25).

Evans, E., & Saxton, J. (2005). *The 21st century volunteer: A report on the changing face of volunteering in the 21st century*. London: nfpSynergy.

The 21st Century Volunteer identifies trends in volunteering and has a section devoted to engaging baby boomer volunteers. This document made frequent references to the Canadian literature. The Home Office review offers sections on motivation, barriers, training, and promotion of volunteering. It concludes with recommendations for organizations, government and private sector.

Foster-Bey, J., Grimm, R., Jr., & Dietz, N. (2007). *Keeping baby boomers volunteering: A research brief on volunteer retention and turnover*. Washington, DC.: Corporation for National and Community Service.

Keeping Baby Boomers Volunteering focuses on volunteer retention – an area of research that has received less attention than that of recruitment.

Graff, L. L. (2002). Emerging trends and issues in volunteerism and volunteer program management. *e-Volunteerism, 2002*(Oct-Dec), 1-20.

Linda Graff is a consultant, author, and trainer in the nonprofit sector. In this article she summarized the results of extensive interviews with a small number of North American experts,

and identifies a number of trends and issues in volunteerism that are “expected to influence and transform volunteerism throughout North America over the next decade” (p. 2).

Graff, L. L., & Reed, P. B. (2007). *The Graff-Reed Conversations: A Way-of-Life Wake Up Call for Canada's Communities. Parts 1 to 6*. Retrieved January 10, 2008, from www.CanadaWhoCares.ca .

Linda Graff worked with Paul B. Reed in 2007 to create the *Graff-Reed Conversations: A Way-of-Life Wake-Up Call for Canada's Communities*. This is a series of five conversations with an introduction that are available in audio and print format on their website. Each conversation in the series is brief and to the point. Graff and Reed are concerned about the future of community participation and hence the future of Canadian communities. They identify the decline in volunteering as a “way of life issue” with issues and solutions that are broader in their implications than the nonprofit sector itself.

Moen, P. (2007). Not so big jobs and retirements: What workers (and retirees) really want. *Generations*, 31(1), 31-36.

Phyllis Moen argues that the “full-time education-employment-retirement lockstep convoy of time... is outdated, having emerged from twentieth-century policies and practices that do not match up with twenty-first century realities of an older workforce, a growing educated and healthy retired force, and millions of boomers on the cusp of moving from being workers to being retirees – but wanting something different” (p. 32). The emerging pattern is one of an extended work life into retirement years. She suggests that many people are now looking for more flexible arrangements that provide them with a combination of challenging work, leisure, community service and spiritual renewal.

Reinventing aging: Baby boomers and civic engagement (2004). Harvard School of Public Health. Center for Health Communication and Metropolitan Life Foundation. Boston, MA: Harvard School of Public Health.

Reinventing Aging is a substantive, and commonly cited, document based on a conference sponsored by the Harvard School of Public Health-MetLife Foundation Initiative on Retirement and Civic Engagement in 2003. This document is a key resource for those work on these issues.

The Resource Centre. <http://national.serviceresources.org>

This website provides information directed toward both recruitment and retention for nonprofit agencies and volunteer opportunities and benefits for potential volunteers.

Smith, J. D., & Gay, P. (2005). *Active ageing in active communities*. London: The Policy Press. *Active Ageing in Active Communities* reviews motivation, recruitment management and support, and looks at what works from both the organizations and the volunteers perspectives.

Understanding Canadian volunteers: Using the national survey of giving, volunteering and participating to build your volunteer program(2004). . Ottawa: National Survey of Giving, Volunteering and Participating. Another document published by the Canadian Centre for Philanthropy together with Volunteer Canada, *Understanding Canadian Volunteers: using the National Survey of Giving, Volunteering and Participating to Build Your Volunteer Program* uses the 2000 data as well. This document has two short sections on senior volunteers

(Understanding Volunteerism, and Recruitment), and refers to *Volunteer Connections* as a key resource.

Volunteer connections: New strategies for involving older adults. (2001). Ottawa: Volunteer Canada. *Volunteer Connections* is a significant resource for Canadian voluntary organizations that draws on data from the 2000 CSGVP. It is quoted frequently in material from the United Kingdom and by several U.S. sources including *Reinventing Aging*.

Volunteering... A booming trend: Experience Personal Fulfillment and Satisfaction Later in Life Through Volunteering. (2000). Ottawa: Volunteer Canada. This pamphlet is directed toward potential Baby Boomer volunteers.

Wilson, Laura B. and Steele, Jack. *Marketing Volunteer Opportunities to Baby Boomers: A Blue Print from the Field.* (2001). Corporation for National Service Senior Corp.: Washington. *Marketing Volunteer Opportunities to Baby Boomers: A Blue Print from the Field* was the result of the work of over 300 project directors and sponsoring organizations in a series of conferences held by the Corporation for National Service Senior Corps in 2001. The document presents a framework for marketing volunteer opportunities developed from the Corporation for National Service Senior Corps Cluster conferences held across the U.S. in 2001. The findings are reported under seven categories: organizational strategies, structures and resources, technology, the role of funders, partnerships and culture and values.

APPENDIX B
Full List of Citations Located in Literature Search

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