



# Volunteering by older people in the EU



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# Foreword

Europe is undergoing a previously unwitnessed ageing of the population. The number of people aged 65–79 will increase by over 30% between 2010 and 2030, and during the same period the numbers of over 80s will rise by no less than 57.1%. One of the effects of this demographic change is that the risk of becoming socially excluded is rising, particularly among older people who have left the labour market. Long-term unemployment and job insecurity are leading to increasing inequalities and poverty risks for many older Europeans. In view of this, social inclusion of the elderly and strategies to promote voluntary work among older people are of growing importance. This is emphasised by the fact that the European Commission has declared 2011 the European Year of Volunteering and 2012 the European Year of Active Ageing.

While the Year of Volunteering aims to promote voluntary involvement among all age groups, it highlights the immense contribution that older people can make in this area. This not only benefits society but helps in the goal of promoting ‘active ageing’, so that people remain healthy, productive and involved in their communities and the risk of social exclusion and isolation is reduced.

This report is based on 30 case studies from 11 Member States in which volunteers, not always exclusively older people, were successfully engaged in meaningful projects of all kinds. The cases demonstrate best practice in all aspects of the issue, ranging from strategies to recruit volunteers, to ways of keeping them engaged and using their talents to the full. In line with the above EU priorities, the report has a special focus on volunteering by people who may themselves be at risk of social exclusion.

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# Executive summary

## Introduction

In the European Year of Volunteering, this report takes up the relatively neglected theme of volunteering by older people in Europe. While it is common to think of older people as beneficiaries of voluntary endeavour, their contribution as volunteers has received much less attention.

This research includes 30 case studies on volunteering by older people from 11 EU Member States: Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Lithuania, the Netherlands, Poland and the United Kingdom. The research focuses on those initiatives that operate mainly at the local level and succeed in involving older people, particularly those at higher risk of social exclusion, as volunteers. It has become evident from research and practice that volunteering in old age may be a tool to promote social inclusion of the older population and to improve quality of life for all generations.

## Policy context

The population beyond retirement age is, of course, large – and growing – but also diverse, with different economic, health and social resources. These different conditions and experiences influence opportunities and preferences for participation in voluntary activities. One of the main reasons for lower rates of volunteering is the poor living conditions of some groups of people, who often have to cope not only with low income but also with physical disabilities. It is important, therefore, to strengthen broader policy strategies such as national health and income policies that target the general improvement of living conditions of older people. Programmes tailored specifically to the involvement of older people as volunteers are rare. Furthermore, the case study organisations differ in the importance they attach to the subject of social inclusion through volunteering.

## Key findings

The case studies illustrate various options for engagement of older people in volunteering. A crucial precondition is, however, that their latent volunteering potential should be recognised and supported. This applies to the policy and practical levels. There is a remarkable range of voluntary activities by older people that go far beyond the traditional age-related topics such as support to frail or sick older people. Various measures necessary to promote the social and cultural integration of population groups at risk of social exclusion are highlighted. The research also demonstrates impacts on intragenerational relations as well as on intergenerational solidarity in the community.

Recruitment of older people as volunteers (and among them, those at risk of social exclusion) often requires some effort. Nevertheless, several factors facilitating their involvement are identified: in addition to reliable funding, recruitment and retention strategies that are tailored to this group are important. However, social inclusion of older people through volunteering has become a new challenge. There is still a general lack of political awareness of the potential of older people.

With regard to recruitment and retention of older people for volunteering, the following elements seem to contribute to success (often in combination with one another).

- Comprehensive media, communication and awareness-raising approaches are the ‘classical’ way to engage older volunteers. In addition, it is helpful to cultivate and maintain relationships with specific groups, such as religious and ethnic communities as well as with community centres.



- A small proportion of initiatives do not aim directly at encouraging older people to volunteer; instead, their involvement is a ‘side effect’. In fact, the goal of some measures is the general promotion of active and self-determined ageing. They invite older people from different social strata to think and talk about their expectations regarding different aspects of ageing as well as to support each other.
- To reach those older people who are not yet involved, a ‘gatekeeper’ can be helpful. A gatekeeper usually already participates to a certain degree and therefore bridges the gap between the initiative and the potential volunteers, for example by inviting family members, friends and neighbours to become involved.
- Preparatory courses can promote recognition and awareness of competencies by helping older people to value their life experience and skills as resources for volunteering. Such courses can also support re-orientation after a critical life event.
- An important precondition to enjoying voluntary work is that volunteers undertake only those tasks they are able to perform. Many initiatives try to ensure this by assessing volunteers’ skills and offering special training courses.
- Esteem and acknowledgement are highly important for the retention of volunteers. Offering awards to volunteers and to voluntary organisations can be an effective way of showing appreciation.
- If the organisation offers the volunteers flexibility, they appreciate being able to decide on the extent of their commitment. This applies, for example, to frequency and duration of participation in voluntary work, which may be important to the new generation of older volunteers.
- To retain volunteers, provision of insurance as well as expense allowances may play a crucial role.

Many positive effects of volunteering on older people can be demonstrated – for example, enhanced subjective well-being and strengthened self-esteem. These effects can be explained by the frequently reported satisfaction at being able to pursue meaningful and fulfilling activities beyond paid work and family obligations. Despite their individual situations, problems and risks, older volunteers succeed in ageing actively.

### Policy pointers

Voluntary engagement in old age does not replace provision through formal social, cultural and other organised services. Quite the contrary; the case studies demonstrate the positive and complementary effects of voluntary engagement that are known from other studies. Professional support by salaried staff can also be regarded as one of the most important influencing factors for effectiveness and sustainability.

To date, social partners appear relatively passive in their support of voluntary engagement. There are a few examples of company retirement policies and planning that include preparation for post-employment volunteering. However, community involvement can be encouraged and often develops in the course of an individual’s working life. Participation in volunteering in later life is more likely to occur if people have experience in earlier years, so opportunities should be sought to promote volunteering more systematically during working years.

Targeted strategies on all levels are required to establish an appropriate framework for the meaningful inclusion of older people in volunteering. This should include the networking of relevant stakeholders at various levels to ensure the exchange of experience and information. In this context, as well as with respect to general support of initiatives and organisations at local level, local authorities are of special importance.

National promotional programmes and supportive legislation appear to be helpful and can stimulate action. However, without direct local backing mostly by local authorities, they are ineffective. A mix of strategies is most effective, both with regard to instruments (funding, infrastructure, support by professionals) and programmes. However, clear standards and support measures are necessary, particularly in developing initiatives that target socially excluded groups. Above all, a culture of recognition of the value of volunteering by older people, at local, national and EU levels, is essential.

# Introduction and policy context

Europe is facing unprecedented demographic change that includes a previously unwitnessed ageing of the population. Demographic ageing is accelerating, and the number of elderly people aged 65–79 years will increase by about 37.4% between 2010 and 2030. With life expectancy rising continuously, European Member States are witnessing the presence of an ever-increasing number of very old people (those aged 80 years or above). The percentage of people in this age group will rise by 57.1% between 2010 and 2030 (European Commission, 2005).

In view of these demographic and societal changes, social inclusion of the elderly and strategies to promote voluntary work among older people are of growing importance. However, considering the increasing life expectancy and the different life situations of older people in the 27 EU Member States (EU27), it must be taken into account that older people are already a heterogeneous population group and are becoming more so. This means that old age is characterised by a growing diversity in lifestyles, values and specific chances and challenges. Consequently, older people's resources in terms of finances, health and social contacts are also extremely diverse across the EU Member States and decisively influence the personal scope for autonomy, active participation and the assumption of responsibilities in old age.

## EU policy background

To promote voluntary work among older people in Europe, particularly of those at risk, is one of the most important goals on the EU political agenda. This can be illustrated using the example of the focal points of the European Years in 2010, 2011 and 2012.

For instance, the European Year for Combating Poverty and Social Exclusion in 2010<sup>1</sup> explicitly and implicitly referred to older persons with the following two main objectives:

- 'to recognise the fundamental right of persons experiencing poverty and social exclusion to live in dignity and to take an active part in society';
- 'to promote public support for social inclusion policies, emphasising collective and individual responsibility in combating poverty and social exclusion, and fostering commitment by all public and private actors'.

Promoting social inclusion, in particular through the reduction of poverty, is also one of five key areas of the Europe 2020 strategy. It must be kept in mind that as far back as 1994 the Council of Europe recommended that the Member States take policy initiatives to prevent the social exclusion of older people by promoting their social integration (Council of Europe, 1994). In this context, volunteering can be regarded as an appropriate instrument.

The European Commission has declared 2011 the European Year of Volunteering. Its main aim is 'to encourage and to support ... the efforts of the Community, the Member States, local and regional authorities to create the conditions for civil society conducive to volunteering in the European Union (EU) and to increase the visibility of voluntary activities in the EU' (European Council, 2009; EC 2010/37). The idea is to bring voluntary work as a basic dimension of active citizenship and democracy to the collective consciousness of the Member States. The voluntary commitment of older people, especially in an ageing society, is crucial to this effort.

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<sup>1</sup> See <http://www.2010againstopoverty.eu>.

The EU has declared 2012 the European Year of Active Ageing. The main goal is to support the Member States, the social partners and civil society in their efforts to promote active ageing and to put greater effort into mobilising the potential of the rapidly increasing proportion of older people in the population, thus promoting the contribution of older volunteers to society, so that the solidarity between generations is strengthened and preserved. The European Year of Active Ageing will focus on two central fields of action:

- improving employment conditions for older workers;
- supporting social engagement in old age and healthy ageing to combat social exclusion and isolation – which is the explicit link to volunteering.

In view of the demographic and societal changes taking place, the risk of becoming socially excluded is rising, particularly among older people who have left the labour market. Long-term unemployment and job insecurity are leading to increasing inequalities and poverty risks for many older Europeans. Changing one's status from paid worker to retiree is accompanied by changes in the income situation, which makes older people more vulnerable and thus promotes the risk of social exclusion (Ogg, 2005; see also Chapter 1). There is empirical evidence that the risk of being socially excluded increases with advanced age and that this is especially true for older women, particularly very old and/or widowed women (Hoff, 2008).

In searching for measures promoting the social inclusion of the older population who have already left the labour market, special attention has to be paid to measures encouraging volunteering. In this context, there is empirical evidence (Institute for Volunteering Research, 2004) that volunteering in old age and/or civic engagement of older people (which was not the research focus in this report; see below) might be a tool to fight social exclusion and thus to promote social inclusion of the elderly population as well as social cohesion and quality of life for all generations (Greenfield and Marks, 2004).

Against this background, this research aims to answer the question whether the risk of social exclusion of older people can be combated by encouraging them to take up volunteering. Taking the heterogeneity of ageing and the influence of different country-specific conditions into account, examples of best practice were sought from 11 European Member States: Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Lithuania, the Netherlands, Poland and the United Kingdom. The report provides insights into the conditions for a successful involvement of older people, particularly those at risk of social exclusion, and includes recommendations for policymakers, other players on the local, national and EU levels and the social partners.

# Social exclusion, active ageing and volunteering in old age 1

Social exclusion encompasses far more than material/financial deprivation and poverty (which, however, are complementary to each other). It is a more comprehensive concept that refers to ‘the dynamic process of being shut out, fully or partially, from any social, economic, political or cultural systems which determine the social integration of a person in society’ (Walker and Walker, 1997). This multidimensionality is a key element and a crucial advantage of the social exclusion concept over that of poverty, because it conceptualises social inclusion as a multifaceted phenomenon involving deprivation across a range of material and non-material dimensions (Layte et al, 2010).

Focusing on the social exclusion of elderly people, one consequently has to take into account those risk factors that are particularly significant for the life situation in old age. It is advisable not to follow a general conceptualisation which is in principle true for all age groups, such as the four domains distinguished by Jehoel-Gijsbers and Vrooman (2008). Instead, the dimensions of social exclusion that are of particular significance for older people should be taken as points of departure (Naegele, 2010). For this report, social exclusion of older people is conceptualised mainly as a low degree or even lack of participation in both formal and informal social and/or family networks, including leisure activities, inadequate social support and social isolation. Furthermore, social exclusion in old age can also be understood as inadequate access to social, health and care services for the elderly (Jehoel-Gijsbers and Vrooman, 2008). In short, social exclusion in old age is regarded as a significant sub-dimension of social disintegration (Walker and Walker, 1997).

Here, the concept of social exclusion is linked with the sociological concept of ‘life situation’, or *Lebenslage* (with the focus on older persons, however) (Bäcker et al, 2007). In this concept, social risks, particularly in old age, focus on factors (other than poor economic and health status) such as weak social networks, including family status (widowhood or divorce, for example). These social risk factors might lead to isolation and loneliness, poor access to informal social support, poor access to social, health and care services, restricted mobility, poor housing conditions and other environmental factors (such as living in rural areas) that can lead to social exclusion (Clemens and Naegele, 2004; Hoff, 2008). In this context, self-perception of being old and belonging to the group of aged people should also be taken into consideration, keeping in mind that empirical data show a strong correlation between belonging to the group of socially disadvantaged people and negative self-esteem (BMFSFJ, 2010a).

Apart from the concepts of social exclusion, *Lebenslage* and disintegration, the fourth conceptual point of departure for this report was the concept of active ageing. Originally, this concept was developed by the World Health Organization (WHO) in the mid-1990s to promote healthy ageing (WHO, 2002). However, this report follows the broader interpretation of the UK sociologist Alan Walker (Walker, 2010). Here, active ageing is related to the individual and societal usefulness of older people. For Alan Walker, both volunteering and civic engagement (which was not the focus of this report) in old age are seen as components of active ageing as they reflect a lifestyle that encompasses two dimensions of being useful: for the individual himself/herself as well as for society as a whole. Accordingly, volunteering and civic engagement in old age both reflect active citizenship and thus also contribute to healthy ageing (BMFSFJ, 2006b). In this sense, volunteering benefits both others and the volunteers themselves and can be regarded as a type of engagement in old age that, in many cases, might lead to a win-win outcome.

The basic assumption of this report is that the risk of social exclusion of older people can be combated by encouraging them to take up volunteering and thus promoting the idea of active ageing. Consequently, the focus is on such measures of volunteering that might serve both the older volunteers themselves by promoting their social inclusion and/or avoiding social exclusion as well as those who benefit as recipients from the volunteering of older people, particularly those who are themselves also at risk. In doing this, it is important to keep in mind that volunteering is extremely multifaceted and

heterogeneous and that there is no uniform definition.<sup>2</sup> In order to define the object of the research more precisely, volunteering is regarded as a form of unpaid work done for others, in this case particularly for people other than family members. Furthermore, a distinction is usually made between ‘formal’ and ‘informal’ voluntary work. Formal voluntary work is linked to an organisation outside the private home or the family, such as clubs and associations; informal voluntary work may, for example, take the form of self-help, support within the family or assistance to neighbours (Hank et al, 2005). This research focuses explicitly on formal volunteering, typically linked to an organisation with a benefit for the community and the volunteers and without concern for financial gain.

Volunteering is often understood as a sub-type of civic engagement, as described in the conceptualisation of active ageing by Alan Walker (see above). In this sense, volunteering can be interpreted as an element of civic society that is seen as a more general principle to shape society, and thus is built on political and/or societal self-organisation and/or the readiness to participate in societal and political activities mainly at the local level – for example, through political parties, citizens’ action committees or in other types of political participation, representation or self-organisation. However, this special perspective on civic engagement is not the focus of this report. Rather, emphasis is placed on volunteering in old age, which is primarily directed to other individuals or groups, often socially disadvantaged ones, and thus contributes to social solidarity.

In all, these assumptions and concepts not only serve as a theoretical framework, but they also serve as selection criteria for the case studies, which are our most significant sources of information (see Chapter 2).

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<sup>2</sup> For an overview of the definitions of volunteering used in the respective EU Member States, see GHK (2010a, p. 49 ff.).

# Research objectives and methods 2

Cross-national research shows that volunteering is distributed unequally among the European countries. In general, voluntary work is more widespread in the Nordic countries than in southern Europe. On closer examination, more differences emerge, which can be traced back to the different welfare regimes (Hank et al, 2005). Esping-Andersen (1990) differentiated the liberal regime (Anglo-Saxon countries), the corporatist regime (continental Europe) and the socio-democratic regime (Nordic countries).<sup>3</sup> Ferrera (1996) distinguished a fourth category of welfare regime, the Mediterranean type, which was acknowledged by Esping-Andersen (1999). To integrate the post-communist countries, Fenger (2007) extended Esping-Andersen's welfare regime typology by the 'former USSR type' (for example, Latvia and Lithuania) and the 'post-communist European type' (for example, Hungary and Poland).

To consider this heterogeneity of the distribution of voluntary engagement in Europe for this research, the countries chosen were those with varying participation rates that also reflect differences in the respective culture of volunteering. Chapter 4 gives information on the differing significance of voluntary engagement in the participating countries of Denmark, Germany, Finland, France, Hungary, Italy, Latvia, Lithuania, the Netherlands, Poland and the United Kingdom.

The research was conducted by national correspondents in the participating countries. The correspondents each had two different tasks: 1) to write national background reports in order to deliver insight into country-specific conditions with respect to the issues of volunteering among older people and social exclusion; and 2) to present case studies (focusing on 'best practice') on volunteering in old age, particularly done by those who are at risk of social exclusion.

## National background reports

The 11 national background reports provide an insight into country-specific conditions with respect to the issues of volunteering and social exclusion of older people. The national correspondents were asked to sift through relevant scientific publications and policy papers and to consult internet databases. The main focus of their research, which was predetermined in terms of a consistent research guideline, was on:

- groups of older people at risk of social exclusion;
- the main objectives of a national strategy or policy targeting older people and their social exclusion;
- a general description of volunteering at the national level;
- older people in volunteering;
- support for volunteering of older people at the national level as a measure to combat social exclusion of this group;
- measures to strengthen volunteering during the transition from work to retirement;
- obstacles to volunteering.

Findings from the national background reports are incorporated into Chapter 4 and serve as background information for the identification of promoting and impeding factors as well as for the development of the conclusions and policy pointers.

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<sup>3</sup> The Netherlands can be characterised as a hybrid between the Nordic and the corporatist regime (Jehoel-Gijsbers and Vrooman, 2008).

### Case studies (successful approaches)

With regard to the case studies, the focus was mainly on the ‘inner world’ of volunteering in old age, particularly of those at risk of exclusion. Strategies for the recruitment and retention of older volunteers were of particular interest. The way in which voluntary engagement affects the life situation of people who are active volunteers was also examined. In close collaboration with the head institute, the national correspondents were commissioned to select examples of best practice.

The case studies did not have to exclusively target vulnerable (older) people, but at least some of the active volunteers in question should be affected by some kind of risk. Each national correspondent conducted three case studies. To gather comprehensive information about volunteering by older people in two Baltic countries, the Latvian research partners contributed one national case study from Lithuania in addition to two case studies from Latvia.

It was clear from the outset that considering the variety of participating countries and the heterogeneity in terms of practice of volunteering in old age, the case studies would present a wide scope of activities as well as of groups of older volunteers, in particular those at risk of social exclusion (see Chapter 5). To respect country differences, no further specifications were made regarding older volunteers, fields of voluntary commitment or organisational framework. As a result, the national case study material contains a variety of examples which demonstrate that volunteering can facilitate the social inclusion of older people. This report, which summarises the case study material, can be regarded as a pool of experience that provides helpful information about the social inclusion of older people through volunteering in the participating countries. Chapters 5 and 6 expand on the main findings.

To ensure a certain degree of comparability despite the country-specific differences, the head institute provided the national correspondents with a case study template which comprised the following major research questions:

- What are the content and target (groups) of the measure?
- What are the characteristics of the volunteers?
- Are older people at risk of social exclusion involved?
- What are the effects of volunteering on voluntary active [people]?
- Does the respective measure feature sustainability and transferability?

Each item was divided into several sub-items to ensure the adaptability of the template. Apart from sifting through the documents on the case studies, the national correspondents obtained their information from personal, qualitative interviews with salaried representatives of the relevant initiatives and organisations. Partially narrative interviews with older volunteers were also conducted to consider their first-hand experiences.

### Integrated report

Both the case study material and the national background reports were evaluated by computer, using the software MAXQDA. Based on the case study template, a set of categories was developed, to which the relevant topics from the respective countries were systematically assigned. The systematically grouped data were incorporated into the report based on their relevance for the research topics.

Since this report follows an integrated approach, only some of the 30 case studies can be presented, and then only briefly. Table A1 in the annex includes short descriptions of the case studies. The full case studies and national background reports are available from Eurofound upon request.



# Social exclusion of older people in Europe 3

There is empirical evidence that the risk of becoming socially excluded is widespread among older people, particularly among those who have left the labour market, and that their respective risk increases with age. Consequently, social exclusion in old age mainly affects very old people, and among them particularly older women (Hoff, 2008).

However, given a high degree of social, regional, cultural and cohort-specific heterogeneity among Europe's older population, it can be assumed that the risk of social exclusion (not only among older people) is not equally distributed across the Member States. Social exclusion among older people in Europe is highly dependent on the welfare regime of the country concerned and the quantity and quality of existing social, health and care services and other services geared towards the social integration of older people (Hoff, 2008). Research data show that social exclusion among older people is distinctly less common in the Scandinavian countries than, for example, in the new eastern European Member States (Szivós and Giudici, 2004; Ogg, 2005; Jehoel-Gijsbers and Vrooman, 2008). However, differences can be found not only across countries, but also within them – taking the growing social heterogeneity of older people as one of the main features in all modern ageing societies (Naegele, 2010).

The evidence also reveals that risk factors for social exclusion in old age vary widely across the EU, as shown by a number of further differences in various terms, of which the following four dimensions are of major importance: 1) the state of welfare policies; 2) environmental dimensions; 3) health status and life expectancy; and 4) social networks, family status and family ties.

1. There are distinct differences between the EU Member States in terms of welfare regimes and welfare policies (Ogg, 2005). There is clear empirical evidence for the correlation between material deprivation<sup>4</sup> and poverty<sup>5</sup> on the one hand and social exclusion in old age on the other hand.
2. Environmental factors can also have an impact on the degree of social exclusion. This particularly refers to older people. In the western Member States, living in an urban area can be a risk factor for social exclusion. Restricted mobility can also lead to social exclusion (European Commission, 2010).
3. It appears that social exclusion in old age is strongly related to very old age, partly due to the strong correlation between advanced age and chronic diseases and/or being dependent on care (BMFSFJ, 2006b). Even if the life expectancy in the EU as a whole has increased over the last 50 years, the differences between the Member States remain significant.
4. Family status and family relations strongly influence the risk of being socially excluded, especially among older women and particularly in the case of widowhood and divorce (Hoff, 2008). On the whole, older people (those aged 55 years and above, according to Jehoel-Gijsbers and Vrooman, 2008) in the Nordic countries and in the Netherlands are the least excluded from society. The continental (including Germany) and Anglo-Saxon countries follow, and then the Mediterranean countries. The social exclusion of older people is most pronounced in eastern European states, especially in the Baltic States and Poland. The Czech Republic and Slovenia, however, have similar figures to Spain and Italy (Jehoel-Gijsbers and Vrooman, 2008).

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<sup>4</sup> People are considered to be materially deprived if they are unable to fulfil 'at least three of the nine following items: ability to face unexpected expenses, ability to pay for one week annual holiday away from home, existence of arrears (mortgage or rent payments, utility bills, or hire purchase instalments or other loan payments), capacity to have a meal with meat, chicken or fish every second day, capacity to keep home adequately warm, possession of a washing machine, a colour TV, a telephone or a personal car (4 items).' (Zaidi, 2010, p. 22)

<sup>5</sup> The threshold for the risk of poverty is 60% of the income median.

With respect to Latvia and Lithuania, the national correspondents underline the following additional comments, which are worth taking into account: Latvia is the country with the highest poverty rate in the EU (46% of the age group 60+; Eurostat, 2010). Here, the fact of being old is already associated with the risk of social exclusion. In Lithuania, a considerable proportion of the older population is affected by low life expectancy and poor health status, which are regarded as severe risk factors for social exclusion.

# Differences in volunteering across Europe 4

It has already been mentioned that the European countries show significant differences with respect to the extent of volunteering. However, an accurate comparison of the involvement rates by country is difficult. National research on volunteering often produces lower figures than cross-national studies like the Eurobarometer or the European Values Study. This is mainly due to differences in the definitions of voluntary work, research questions and sample sizes (GHK, 2010a). It must be taken into account that the country-specific information presented in this chapter is mainly based on the national background reports and refers in part to different national or cross-national surveys.

On the micro level, a low educational level, poor health and very old age (75+) are generally strong impeding factors for volunteering by older persons (Hank and Erlinghagen, 2005). In addition, experience in voluntary work enhances the probability that someone will continue volunteering as they get older. These factors correlate with certain parameters on the macro level. Different welfare regimes have already been mentioned (Chapter 2). Furthermore, volunteering (not only among older people) seems to be more common in countries where voluntary work is associated with a more expressive character (for example, Sweden, the Netherlands and Germany). In these countries, volunteering (in all age groups) is mainly connected with culture and leisure activities and includes the possibility of choosing voluntary activities based on individual interests. Nonetheless, involvement is less widespread in countries where voluntary tasks focus mainly on services in the social sector. This applies in particular to countries such as Spain or Italy (Hank et al, 2005).

Furthermore, 'volunteerism tends to be particularly high in nations that have: 1) multid denominational Christian or predominantly Protestant religious compositions, 2) prolonged and continuous experience with democratic institutions, 3) social democratic or liberal democratic systems, and 4) high levels of economic development' (Curtis et al, 2001, p. 783). It becomes quite clear that a culture of volunteering depends heavily on the economic characteristics of a society, as well as on its social norms and values.

Regarding the fields of activity of volunteers in Europe, it can be observed that, regardless of country, they mostly concern sports. Other areas with high involvement rates are 'social, welfare and health activities; religious organisations; culture, recreation and leisure; and education, training and research' (GHK, 2010a, p. 78). No European comparative data are available regarding the preferred fields of action of older people.

The following sections enlarge on selected aspects of voluntary work with respect to the participating countries. To provide the respective relevant context information, the results are ordered by country. Besides general information about volunteering, country-specific barriers to the involvement of older people in voluntary activity are presented. In addition, national strategies for supporting volunteering of older people are specified. The chapter concludes with information about the role of volunteering in measures to facilitate the transition from work to retirement.

## General description of volunteering

While in some participating countries national surveys on volunteering are carried out regularly (for example, the UK and Germany), comparable studies in other countries are conducted either irregularly or never (for example, Latvia). This causes differences in the availability of data on volunteering in the countries concerned. Another difficulty relates to the international comparability of surveys. Definitions of volunteering may vary between the countries (see the Introduction to this report). In addition, there are wide differences between the research questions and aspects considered by the respective studies. For example, not every survey includes data about the fields of voluntary activities, age groups of volunteers, gender differences and the extent and duration of volunteering. Against the background of the data problems mentioned, this chapter provides an overview of selected aspects with respect to volunteering in the participating countries. More detailed information is available in the national reports, which can be obtained on request from Eurofound.

### Netherlands

A long tradition of volunteering is deeply rooted. Voluntary work is highly appreciated by Dutch society and the government alike, and is supported by several political promotion programmes. Data show that older people are more involved than other age groups. In 2005, one in three people aged 55 to 75 volunteered, as did 25% of people aged 35 to 54 and 17.3% of those aged 15 to 34. The main fields of activity include sports clubs, religious or ideological organisations, neighbourhood support, support for disabled people and caring activities. Commitment in the framework of political organisations or in trade unions is less common. Beyond that, the Dutch prefer project-based voluntary work instead of long-term commitment.

The Netherlands' administration and society have become increasingly aware of older people's competences; this is associated with a social norm of staying active even in old age, except for those who are not able to. Good framework conditions and infrastructure for older volunteers have been developed. Both a high life expectancy and a high level of old-age security facilitate their commitment. Nevertheless, there is evidence of a slight decline in the number of volunteers at the age of 65+ (EVC, 2007): the older Dutch tend to concentrate on their own families or on paid work.

### United Kingdom

There is a long tradition of volunteering and many formal voluntary organisations play an important role in social policy. Under the circumstances of the economic crisis, the state is currently spotlighting voluntary activities to compensate for cuts in public spending. According to the National Citizenship Survey (Drever, 2010), all age groups have some regular involvement in volunteering. In the age group 50–64, some 28% of people are active in voluntary work. In the age group 65–74, this figure is 30%, and in the age group 75+ it is 20%. In comparison with other age groups, older people in the UK seem to prefer an involvement in the framework of religious communities (46% of the group aged 65–74 and 50% of people aged 70 and over). Other main fields of activity for older volunteers include local community and animal welfare groups. In addition, 27% of the age group 65–74 and 38% of those aged 75 or older are committed in the framework of older people's groups.

In general, more women (28%) than men (23%) volunteer, and their likelihood of volunteering is significantly influenced by their level of education and professional qualification. The main fields of activity are sports/exercise organisations (52%), where even older people (42% of those aged 65–74) are often involved. Furthermore, social clubs/organisations (40%) and children's organisations/schools (34%) are very popular (Drever, 2010). Some 56% of volunteers learn about initiatives through other volunteers, followed by 24% who learn about possible fields of voluntary activities from friends and 22% who already knew about the initiative concerned because they used their service prior to their own commitment. Only 1%–3% of volunteers were recruited by means of public relations.

### Denmark

Voluntary work is deeply rooted in the Danish culture, with 35% of the Danish population reported to have volunteered during the previous year (Koch-Nielsen et al, 2006). The most favoured fields are sports and leisure, followed by activities related to housing, the local community, social and health care. The variety of organisations and initiatives in the voluntary sector is wide. In comparison with other Nordic countries like Norway and Sweden, volunteering in Denmark is professionalised to a higher degree: volunteers who work for an organisation are staff members and entitled to expense allowances. The municipal support of voluntary initiatives is regulated by law. Local authorities are obliged to fund the voluntary sector and the funds are provided by the Danish government. Cooperation and distribution of funding have to be documented. The legal framework has promoted the implementation of strategies on volunteering in about 64% of the 98 Danish municipalities.

In a similar way to Germany, Denmark also considers the encouragement of older people to volunteer as a way to face up to the demographic change. In comparison with other age groups, the number of older people who are active

volunteers is relatively low; 25% of people aged 66 and above are involved. They prefer volunteering within an organisational framework to a greater extent than younger people. The main fields of voluntary work among older people are social and health care.

### Finland

This is another country with a high level of volunteering. The framework for voluntary work is highly structured. While voluntary organisations were less important after the Second World War due to the development of the welfare state, this changed in connection with the economic crisis in the 1990s. Since that time, the government has welcomed those organisations and volunteers as partners in the pluralistic welfare society. Finland has no national policy on volunteering, but the voluntary sector is working on developing a national strategy. Beyond that, there is no central institution to coordinate the different types of support for volunteering. Responsibility for volunteering affairs is shared between different ministerial bodies.

National survey data on volunteering in Finland are rather scarce. In 2010, 36% of the population stated that they had volunteered in the preceding month (KansalaisAreena, 2010). When comparing 2001 and 2010, it becomes apparent that the proportion of people engaged in active volunteering remained constant. However, less time was spent on volunteering in 2010 (13.4 hours vs. 18 hours per month). Nonetheless, Finland witnessed an increased interest in commitment related to services for older people and care. As in the UK, a growing number of experts in Finland caution against political instrumentalisation for the purpose of substituting benefits of the welfare state.

The involvement of older people in voluntary work is above the average for the total population. Overall, 40% of Finns aged 65–79 years state that they are active in voluntary work. With a mean of 17 hours per month, older people also spend more time on their commitment (KansalaisAreena, 2010). Their motivation varies from supporting other people to enhancing their own well-being (Haarni, 2009; Rajaniemi, 2009). Not all organisations have yet recognised the skills and competences of older age groups. This is particularly true of associations related to the health and well-being sector, which focus their recruitment strategies on younger age groups.

### Germany

The development of a civil society in Germany benefited significantly from a change in social norms and values during 1965 and 1975. In addition, an educational expansion together with a rising population contributed to increasing involvement rates in volunteering in the long term. Between 1999 and 2009, the proportion of volunteers rose from 34% to 36% (BMFSFJ, 2010b). The main fields of activity are sports, schools and nursery schools, church/religion, the social sector, culture/music and leisure. Beyond that, volunteering in Germany is characterised by pluralisation. This concerns the organisational framework as well as the fields of activity. On the one hand, the scope of possibilities for voluntary work is expanding, and on the other hand a trend towards project-based commitment can be identified.

At governmental level, the German Federal Ministry for Family Affairs, Senior Citizens, Women and Youth (BMFSFJ) is in charge of volunteering and related topics. It releases a representative survey on volunteering (*Freiwilligen survey*) which has been conducted three times to date (1999, 2004 and 2009). In October 2010, the German government approved a National Strategy on the Promotion of Volunteering. It includes the implementation of a national Volunteering Service for all Generations which is to replace the mandatory civilian service for young men. Provided that a minimum of eight hours per week over a period of at least six months are spent on the commitment, volunteers are eligible for further education and insurance. In addition, since 2004 the federal government has supported the Week of Volunteering that was launched by the National Network for Civil Society (*Bundesnetzwerk Bürgerschaftliches Engagement*). Since 2010, a department for voluntary work within BMFSFJ has been responsible for this.

Comparing 1999 and 2009, the proportion of volunteers aged 65+ grew from 23% to 28%. The percentage of volunteers also increased among those over 70, from 20% in 1999 to 25% in 2009 (BMFSFJ, 2010b). Older volunteers prefer to work in the fields of churches/religious communities (7%), the social sector (6.8%) and sports (6.4%).

### France

France has about 18.3 million people over 15 years of age who are involved in voluntary activity (France Bénévolat, 2010). However, this number includes informal activities outside the family, in which a total of 7.4 million people are involved. Preferred fields of action are sports, culture, leisure and services for older people. Men prefer fields of action that are related to sports, other leisure activities and their profession. Women generally focus on the social sector.

France ranks among the countries where participation rates for voluntary commitment increase with age. A separate analysis of the different age groups shows that the participation rate of people between 60 and 74 is highest, with a total of 36.9% (INSEE, 2010). This age group is particularly active in the fields of culture, leisure and welfare. The participation rate of older people (75+) decreases to 27.6%; they are primarily involved in activities aimed at other older people.

### Latvia

An organised approach to volunteering in Latvia had its starting point in the framework of the country's independence in 1991. However, there is no systematic collection of data at national level. The Eurobarometer (2007) specifies that 20% of the Latvian population are actively involved in voluntary work. Very little information is available on older volunteers, but according to the national background report on Latvia this age group is not involved to a high degree. The highest number of volunteers are among those aged 15–25 years, who mainly volunteer in the fields of culture and sports. In general, voluntary activities related to religious communities, environment and social projects are of most interest. Moreover, the Latvians favour event-based commitment over long-term obligations.

Due to several changes in ministerial responsibilities, there is currently no institutional framework for volunteering in Latvia. However, there is a government programme for Strengthening of Civic Society 2008–2012. The improvement of the legal framework for volunteering was prepared in 2010, but has not yet been approved by the Latvian parliament. Foreign foundations or grants are the main funding sources for volunteering. In addition, the Social Integration Foundation, set up by the government and local authorities, contributes to funding.

### Hungary

A once-lively tradition of volunteering in Hungary was destroyed by the socialist system. Civic engagement outside of government-influenced organisations was prohibited; people were obliged to 'volunteer' in organisations controlled by the government. In the run-up to the change of the political system in the late 1980s, associations and foundations were re-activated and their activities increased significantly after the fall of the Iron Curtain in 1989. Today, support for volunteering is on the Hungarian political agenda and the development of a legal framework started in 2001. In 2002, the Volunteer Centre Foundation, a body which provides volunteers and organisations with information and training, began operating. Three years later the government approved the Act on Volunteering and later developed a Voluntary Development Strategy to run from 2007 to 2017.

Regarding current commitment, national data are available on volunteering in the framework of registered non-profit organisations, but there is no information on informal volunteering or on activities outside registered non-governmental organisations (NGOs). Informal help for family members and neighbours is widespread in Hungary but not noted in official statistics. This explains the different results presented in surveys on volunteering. The Hungarian Statistical Office (KSH) estimated the number of volunteers in Hungary at 4.7% of the adult population in 2007, but a representative survey on volunteering, charity and social integration in 2004 concluded that the activity rates are significantly higher (Czicke and Kuti, 2006).

With regard to volunteering in the framework of registered non-profit organisations, the proportion of people involved decreases with advancing age (KSH, 2001/2002). While 16.6% of people aged 51–60 years are volunteering, this proportion falls to 9.5% for those between 61 and 70. The lowest involvement rate is reported for people over 71 years (6.6%). Regarding their fields of activity, older people are mostly volunteering to improve the welfare of other people.

### **Poland**

As with Hungary, the development of a civic society in Poland was impeded by the socialist state. However, in the early 1980s – prior to the change in the political system – the willingness to contribute to social cohesion by mutual support was high. Due to a bad economic situation and corresponding lack of jobs, this trend declined in the 1980s and 1990s. The unemployment level fluctuated from 16.4% in 1993 to 9.5% in 1998 and 20.6% at the beginning of 2004. It is currently about 10%. As a result, many younger people have sought jobs in other EU countries. Hence, the older generation is focused on their families, particularly on bringing up their grandchildren. Even today, the culture of volunteering is not developed to a high degree, but with regard to the younger generations, an increase of commitment can be observed.

In general, pupils and students are more likely to volunteer than older age cohorts. Many older people in Poland put effort into supporting their adult children – either financially or by looking after their grandchildren. This ‘extended parenthood stage’ causes a relatively low involvement in volunteering. Those older people who are voluntarily active prefer informal types of commitment in the framework of self-help groups or the church instead of formal volunteering. They are characterised by a certain self-chosen degree of independence from family obligations.

### **Italy**

The voluntary sector has a long tradition with roots in the 19th century. The development of a modern state resulted in a decrease in voluntary activities. This was particularly so under the fascist regime, which was mistrustful of voluntary organisations. In 1970, new types of organisations emerged. After a phase of marginalisation in the late 1980s their development progressed in the 1990s, particularly influenced by the crisis of the Italian welfare state. The main focus of voluntary organisations is on topics related to health (28%), social services (27.8%) and culture and recreation (14.6%). The number of Italians actively volunteering rose from about 482,000 in 1995 to 826,000 in 2003 (ISTAT, 2006).

Since the 1990s, Italy’s social policy has increasingly recognised older people’s free time as an enrichment to the voluntary sector. Half of volunteers in the social services area are aged 55 and over. In the health sector this group accounts for less than one-third, and in the field of culture and recreation more than one-third (ISTAT, 2006). The number of older volunteers is growing: this applies to the age group from 55 to 64 years (18.3% in 1997 vs. 23.3% in 2003) and to people aged 65+ as well (8.9% vs. 13.5%). As in Hungary, the commitment of older people is often intragenerational: they frequently provide other older people with (light) care services, support and socialisation services. Organisations that focus on this kind of support are often linked with religious communities and mainly involve people with a relatively low level of education. In general, there is a lack of tailored recruitment strategies for older volunteers. As the number of older people remaining in paid work is increasing, the voluntary sector is concerned that there may be a shortage of older voluntary workers.

### **Lithuania**

As with Latvia, the development of volunteering in Lithuania is in a relatively early stage. In 1990, the first voluntary activities were reported after the country became independent. Due to a lack of funding, most resources came from the volunteers. In particular, youth organisations were set up, followed by older people’s organisations. During the transition from a planned to market economy, the main funding resources for voluntary organisations were foreign foundations and grants. The implementation of Lithuanian foundations progressed when the market economy developed.

Today, around 20% of Lithuanians are active in voluntary work. This applies particularly to the younger generation aged 18 to 25, to people with a university education and to those with a higher income. The main fields of activity are social and health care, children's and youth activities, culture and education. Older people aged 66 and above as well as unemployed people, housewives and those living in small localities (with fewer than 2,000 inhabitants) are least likely to volunteer.

Regarding legislative support for volunteering, Lithuania provides a relatively liberal framework. At the governmental level, the Ministry of Social Affairs and Labour is mainly responsible for volunteering affairs. Other relevant public bodies for the promotion of voluntary activities include the Lithuanian Government Commission on Non-Governmental Organisations, the National Youth Council and the Agency of International Youth Cooperation of Lithuania. Their main contribution is the support of collaboration and communication in the field of volunteering.

It is difficult to get a clear picture of older volunteers in Lithuania. There is evidence that their commitment decreases with advancing age, but as no systematic and comprehensive national research has yet been undertaken on volunteering, no representative data on older volunteers are available. Therefore, some information was gathered from interviews with older volunteers in the framework of the case study from Lithuania. As a result of their generally poor financial state, many older people try to stay in the labour market for as long as possible. Those who volunteer either did not succeed in remaining employed or have sufficient financial resources to allow them to spend their free time on civic engagement. Especially for the first group, volunteering can be considered as a way of becoming socially included.

### Support for volunteering by older people at national level

With respect to the general significance of volunteering on the political level, the variety of the participating countries was presented in Chapter 2. Differences become even more obvious as regards the national programmes or measures promoting volunteering by older people.

#### United Kingdom

The Opportunity Age strategy identifies volunteering in the UK as an option to utilise older people's competences for the benefit of society. Support for volunteering is allocated both at the central and the local level, especially with respect to cooperation with the voluntary sector and to the initial phase of an organisation. Volunteering in the Third Age (VITA), a body which coordinates voluntary work at the national level, concentrates on the recruitment of older people and disseminates successful strategies for promoting their volunteering. The Community Service Volunteers UK (CSV) provides the Retired and Senior Volunteer Programme (RSVP) with a focus on people aged 50+ in England, Scotland and Wales. Within the framework of this initiative, more than 14,000 volunteers are involved in various activities. In general, networking of voluntary organisations with health and social services is widespread at the local level.

#### Denmark

A national fund (*Satspuljen*) aims at promoting active ageing at the local level. The fund is intended to enhance the participation of older people in sports and social activities, for example. A considerable part of the money (about €3 million between 2004 and 2006) has been used to implement and develop volunteering programmes for older people.

#### Finland

There is no central strategy for promoting volunteering by older people. Nevertheless, the Finnish government indirectly supports the involvement of older age groups by contributing to the funding of voluntary organisations. The Age Institute (a research institute on age and ageing) developed a website including information about older people in voluntary activities. The service is tailored to organisations or initiatives as well as to volunteers. In general, retirees' organisations operating nationwide can be identified as relevant supporters of the social inclusion of older people through



volunteering. Furthermore, many social or health associations provide the opportunity to volunteer. Many municipalities, the Lutheran Church and other Christian organisations also address the issue of socially excluded older people and provide a framework for their social inclusion through volunteering.

### **Germany**

As in Denmark, the idea of active ageing is becoming increasingly popular. German policy emphasises the competences and skills of older people. Promoting their voluntary activity is seen as an appropriate option to tackle the negative implications of the demographic change ('demographic burden scenario'). The aim is to support the social inclusion of older people, which has been highlighted in the 5th Report on the Situation of Older People (BMFSFJ, 2006b). Furthermore, the intention of the new national volunteering service mentioned above is to involve a higher number of older volunteers, among other age groups. Under the national federal programme Active in Age, 150 municipalities that applied for financial support will receive €10,000 each to help them gain a systematic overview of the local commitment of older people and to develop reliable structures for volunteering.

### **France**

So far, France has not implemented a national political strategy focusing on the commitment of older volunteers. This may be because the Ministry for Sports and Youth is responsible for voluntary commitment. The need for a commitment policy designed for older people has been addressed several times, for example in two reports commissioned by the Social and Economic Council (They, 1993; Boutrand, 2009). In 1979, the Office of Retired Persons was founded in order to support the exchange of experiences between volunteers, salaried employees and particularly older persons. In France, there are bodies of older people involved in the public sphere, for example in the planning of a national solidarity policy for older people, with some implications also on their volunteering: CNRPA (national level); CODREPA (departmental level); CORERPA (regional level). Furthermore, the independent association France Bénévolat was founded in 2003. In nationwide offices, it places volunteers with initiatives across the country, initiates information campaigns on voluntary engagement and, not least, provides advice for older retired people about possible commitments.

### **Latvia**

The support of volunteering for older people at the national level is impeded by financial restrictions. The Sustainable Development Strategy of Latvia to 2030 aims, among other things, to empower retirees to become volunteers. It was approved by the parliament in 2010, but has not yet been implemented. Important projects at the national level are the EU Grundtvig lifelong learning programme (international exchange of volunteers aged 50 and above), a cooperation with Denmark (Volunteer Seniors in Schools) and a project established by the Latvian Soros Foundation. In all, the Latvian government lacks adequate strategies to involve older people in voluntary work. Currently, their potential primarily seems to be recognised by pensioners' organisations.

### **Hungary**

The National Strategy on Affairs of Older People (approved in 2009) aims to promote the involvement of older people in volunteering as well as to provide the necessary framework requirements to facilitate their involvement. Networking between voluntary organisations and programmes for older persons is to be strengthened and the overview on corresponding national and international activities is to be improved.

### **Italy**

In the past few years, some regional governments have implemented a volunteering service for older people which is a counterpart to the alternative civilian service for younger people. The target group includes older people generally from the age of 60 years and above. The programme's objective is to support the engagement of older people as well as the general broadening of voluntary services. Volunteers are paid approximately €400 per month and can decide on the length of their commitment. Their activities include a variety of fields, such as driving services, supervision in schools

and museums, nursing and caring for children and older people, and mentoring programmes for students. To date, only the regions of Veneto, Emilia-Romagna and Piedmont offer these volunteering services for older people.

### **Lithuania**

Supporting voluntary work, especially of older people, is not yet part of the political agenda. Nevertheless, there is an intention to facilitate volunteering for all people regardless of age as well as to improve the nationwide overview of the possible activities (for example, by developing a database). However, these ideas have not yet been put into practice at governmental level.

# Obstacles to volunteering 5

This chapter deals with barriers that might prevent older people from participating in voluntary work. Included are obstacles at the macro level as well as at the meso and micro levels. Since the main factors influencing participation (health status, educational level and a former involvement in voluntary work) are well reported for the EU Member States (see Hank and Erlinghagen, 2005), the following section concentrates on additional country-specific obstacles.

## Country-specific obstacles

### United Kingdom

Although volunteering is widespread, insufficient advertising campaigns are considered to impede the involvement of many older people. As the case studies show, most of the older volunteers came to know about various organisations from their friends (Drever, 2010). As many older people at risk of social exclusion are not part of social networks, comprehensive strategies for public relations are even more important to reach this target group. However, extensive public relations depend on appropriate funding. Another barrier is a lack of leeway regarding the extent of voluntary work. Older people with limited mobility in particular are less likely to find tasks that meet their skills. In addition, because of concerns about higher insurance premiums in the case of older volunteers, some organisations establish age limits that exclude older people of a certain age. This argument might, in some cases, be used to hide age stereotypes.

### Netherlands, Denmark and Germany

Apart from the well-reported obstacles to volunteering that are mentioned above, volunteers often have to make efforts to balance volunteering with other activities: in the Netherlands, for instance, an increasing orientation of older people towards family activities is documented. In addition, volunteering has to compete against a growing number of alternative leisure activities. Similar time and interest reasons also influence the involvement in Denmark and Germany.

### Finland

Despite the difficulties in gathering information about non-participating older people, the lack of public transport can be identified as an obstacle to volunteering. Furthermore, older people prefer family activities to volunteering. One recognised barrier to older people volunteering is a lack of encouragement: some people need individual support or reassurance to take up voluntary tasks.

### France

Financial expenses that are potentially connected to voluntary engagement are likely to prevent people with low incomes from actively volunteering. Inadequate or nonexistent public transportation services are a further barrier. In addition, the probability of women engaging in voluntary services decreases if neither friends nor acquaintances have already been active in an initiative. Besides, a significant proportion of older persons are already involved in time-consuming family commitments.

### Latvia

Although the conditions for volunteering are completely different from the UK, a lack of information about possible fields of activity hinders the involvement in Latvia as well. This is due to the short history of volunteering in Latvia, which also means there is a lack of interest in voluntary work, in particular among men. In addition, training and recruitment strategies as well as a legal framework for voluntary work are absent. Furthermore, the economic crisis has dampened the commitment of older people to volunteering (GHK, 2010b). Results from the interviews for the Latvian case studies reveal additional barriers that correspond to the general literature on volunteering. Family obligations (for example, caring for grandchildren) present an obstacle to involvement. The geographic framework also plays an important role. In Latvia, living in rural areas is often associated with no or only very limited access to public transport.

### **Hungary**

A reluctance to volunteer on account of the compulsory voluntary work in the socialist system still influences the level of involvement in Hungary. Moreover, there is a lack of information campaigns on the positive individual and societal effects of voluntary commitment.

### **Poland**

The civic society in Poland is in an early stage of development, but a specific barrier to volunteering is that many older people have family obligations.

### **Italy**

The rise in the retirement age in Italy has meant there is less time for volunteering once someone leaves the labour market. As in many other countries, insufficient funding impedes voluntary work. Organisations need more money to provide their volunteers with at least small expense allowances. Another barrier is the difficult reconciliation between volunteering and family caregiving.

### **Lithuania**

As mentioned in Chapter 2, the financial circumstances of older people are generally poor. Because of this, they are forced to hold on to a paid job as long as possible. Doing voluntary work is an option only for wealthier older people or for those who are unable to remain at work. In addition, due to limited financial resources, many programmes that involve volunteers have to be ceased. The third obstacle is related to a lack of information: 40% of Lithuanians have no information about the non-profit sector (NIPC, 2010). It goes without saying that knowing where to volunteer is a crucial precondition to involvement.

## **Volunteering and the transition to retirement**

If volunteering as a tool to fight social exclusion of older people is a comparatively new topic, this also applies to the transition from paid work to retirement. Specific measures to ease this transition do not seem to be common in the participating countries. The national background reports from the Netherlands, Denmark and Poland do not mention this subject. Latvia has no programmes or strategies to promote volunteering in this specific phase. The situation is comparable to Lithuania, where people try to stay in paid work as long as possible because of the low pension level.

### **United Kingdom**

Depending on the size of the business, employer support for volunteering by employees in general is becoming more common: while about 70% of the Financial Times Stock Exchange (FTSE) 100 companies provide their staff with volunteering opportunities, this is the case in 20% of medium and 14% of small companies. In all, 36% of employees reported that they have access to voluntary activities in connection with their paid work (Volunteering England, 2010). As a former involvement in voluntary work fosters the continuing commitment after having left the labour market, general schemes to support volunteering for employers might indirectly succeed in this way as well. However, there do not appear to be any specific measures for future retirees; some companies distribute a register of initiatives to people about to retire.

### **Finland**

There are no volunteering programmes to facilitate the transition from paid work to retirement at the national level. A few businesses and organisations provide their older staff with information on retirement, for example on lifestyle, health, pension planning and sometimes voluntary work. In addition, professional associations for pensioners offer voluntary activities to their retired members.

### **Germany**

The ZWAR programme (case study DE2<sup>6</sup>) presents a successful cross-regional operating initiative that promotes volunteering in North Rhine-Westphalia. The concept is explicitly tailored to the transition from paid or family work to retirement and focuses on those aged 50 years and above. Since 1979, more than 1,000 ZWAR groups in 50 municipalities have been initiated.

### **France**

Even though there are recommendations (Viriot Durandal, 2008) for appropriate measures at national level, they have not yet been put into effect in actual programmes. Several associations have developed offers for people transitioning from paid labour to retirement, for example the JANUS initiative in Nancy (case study FR2).

### **Hungary**

EU initiatives have raised awareness of the specific challenges that occur in the framework of the transition from paid work to retirement and highlighted volunteering as a factor promoting social inclusion. This was mainly brought about by EU funding programmes which focus on the local government level. Consequently, the development of tailored volunteering programmes for older employees in order to reduce their risk of social exclusion is said to be promising.

### **Italy**

Based on a national measure, older public sector workers can work voluntarily for a non-profit organisation instead of continuing their original tasks until retirement age. During that period they are paid 70% of their wage (Principi et al, 2008). However, demand for the scheme is relatively low. In general, measures to encourage employees to volunteer are less prevalent in Italy than in many other EU countries.

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<sup>6</sup> See Annex 1 for a full list of the case studies.

# Thematic review of the case studies 6

This chapter comprises an overview of 30 case studies in total. The main findings are presented thematically. The review of the case study material has a rather descriptive character and at the same time constitutes the basis for the identification of lessons to be learned in Chapter 7. It is recommended to read the following paragraphs in the context of the country-specific conditions presented in Chapters 3 and 4. However, only a few identified peculiarities can be ascribed definitively to country-specific conditions. In those cases, special notes are given. References to specific case studies are given in parentheses. The abbreviations used for the case studies are explained in Annex 1, where information about the case studies as well as about their availability is briefly presented.

## **Data availability**

Only a few initiatives conduct a systematic and regular evaluation of their programmes. Thus, the availability of data regarding their characteristics varies. A comprehensive evaluation of a measure is very rare. Therefore, hardly any data are available about the former voluntary action of the people concerned, and information on their educational level is very scarce as well. Hence, the national partners often had to gather corresponding information from interviews with volunteers or professional staff members of the initiative concerned (see Chapter 2).

Initiatives that systematically evaluate their programmes are mainly linked with an umbrella organisation or are obliged to monitor their measure in order to report to their sponsors on the results and effectiveness of a programme (DK1). In some cases, data are collected and used for the development of training courses for volunteers (NL3). Evaluation may also focus explicitly on the recipients of services provided by the initiatives, rather than on volunteers. If surveys are conducted, they often consist of very small sample sizes. Evaluation at irregular intervals and qualitative approaches are common. Sometimes only sporadic statements of volunteers are collected.

## **Characteristics of volunteers**

### **Age**

The proportion of older volunteers in the case studies analysed depends on the content and target of the initiative/organisation concerned. While some initiatives work with people of all age groups, others exclusively recruit older people. Therefore, this report comprises examples for three situations: where older volunteers are 1) in the minority, 2) in the majority or even 3) constitute the entire voluntary staff.

With respect to the different age groups of older people, the whole scope of ‘young olds’ and ‘older olds’ is represented in the case studies evaluated. However, very old people (80+) – a group at high risk of frailty and, as a result, of social exclusion – are active in voluntary work to a lesser extent. Against this background, it is striking that in one example (IT3) even a few people aged 100 years are volunteering. In this context, it has to be taken into account that the involvement of older and very old people is associated with increased life expectancy and thus the health conditions prevailing in the participating countries.

### **Gender**

In general, the sample shows no distinctive pattern of gender differences. The involvement of women and men cannot be analysed without considering content and target of the respective initiatives (DK2). For example, as family caregiving is still a mainly female domain, a project for ex-caregivers (FI3) will probably attract more women than men as volunteers. The often reported trend of women becoming mainly active in caring activities and men mainly in tasks related to their former occupation can be observed in some of the case studies (HU2), but not in all of them.

### **Critical life events**

The case study material shows that the commitment to voluntary work among older people is often linked to specific critical life events and coping with their impact (examples include loss of responsibilities or social networks, isolation or loneliness). A major group comprises those older people who have left the labour market and therefore lost many relationships that they had established in their working life (HU2; FR3). As retirees they have to meet the challenge of building new social networks outside the labour market. A second risk group is made up of older people who need re-orientation after the death of a spouse or other family member (IT2). Those older people who spent many months or, more often, years caring for a family member are frequently at high risk of loneliness. This is, to a certain extent, comparable to the situation of a significant proportion of older women in the so-called 'empty-nest phase'. Finally, divorced older people form a third subgroup which, presumably, is at risk of being lonely or even isolated (FI1). Therefore, experiencing typical age-related critical life events seems to be a catalyst for volunteering, which in turn can be used for the recruitment of older people who have never been involved in voluntary work before.

### **Health or disability**

Although the majority of the volunteers can be regarded as relatively healthy and mobile, a significantly smaller group is at risk of social exclusion due to physical or mental impairment (UK2). There are several examples of older people suffering from depression, often because of feelings of loneliness and uselessness. Others are hard of hearing, suffer from diabetes or are wheelchair bound. As mentioned above, a few initiatives succeed in encouraging very old, frail people. Their respective activities are often related to mutual support from older persons for older persons (DK1; DE1).

### **Income**

Particularly in the participating eastern European countries and especially in Latvia and Lithuania, a large number of older volunteers have very limited financial resources. This is often because the pension level is low or because they became unemployed before retirement age. Low income as a central determining factor of social exclusion is often associated with other risk dimensions, such as bad housing conditions and poor health, and therefore impedes volunteering as well (LT1).

### **Educational level**

As often reported in surveys, level of education is a strong influencing factor on volunteering. In comparison to the younger generations, many older volunteers are disadvantaged with respect to their educational background (NL1).

### **Ethnicity**

Some initiatives emphasise the involvement of migrants (DE3; UK1; NL3). In many cases, migrants are socially excluded because of limited skills in their second language and a higher risk of unemployment. Older migrants in particular often face loneliness and isolation.

### **Living conditions**

Sometimes, living in a socially disadvantaged area or district also increases the risk of social exclusion. This applies in particular to residents of rural areas with limited access to social life or to people living in deprived areas (LV2; NL2). Their problems are related to limited mobility (UK3) and lack of opportunities, particularly with respect to social infrastructure.

## **Motivation to become involved in volunteering**

### **Reciprocity**

One important motivation for volunteering by older people is to give back the help and support they once received (FI1; DK1). In other cases, volunteers hope that their support will be 'paid back' to them if they are ever in need of help themselves (LT1).

**Active member of society**

Some volunteers report on their intention to join a group in order to make social problems more visible. Those people show a strong identification with their community and a will to tackle social problems.

**Case study (IT1)**

In 2002, on behalf of the municipality of Carpi, older volunteers conducted a survey among the residents aged 75 years and above to learn about their requirements. When the authorities did not react with appropriate measures for financial reasons, the interviewers decided to become active themselves. They founded the Older People Network initiative and developed a wide range of events as well as driving and visiting services for older people.

**High demand for learning in the broadest sense**

In many cases, the volunteers seize the chance to gain knowledge and skills in a subject they can choose themselves. Having access to special events can be a strong motivating factor as well. For example, some initiatives give their volunteers the chance to participate in international volunteer exchange programmes (HU3) or to meet politicians (PL1).

**Identification with initiatives**

The autonomy of an initiative increases the motivation to become involved. Volunteers feel more responsible for the development and longevity of the programmes (NL1). This is also true if a programme was initiated at grassroots level. It enhances the identification with content and target.

**Recruitment of volunteers****Special attention to older people at risk**

A closer look at the recruitment strategies reveals the variety of initiatives and organisations. First, a distinction has to be made between initiatives or organisations that tailor their recruitment strategies to (older) people at risk of social exclusion (UK2) and those that succeed in attracting vulnerable older people among others (HU1). The sample includes a higher proportion of the latter.

The case studies demonstrate that social inclusion of older people through volunteering is a comparatively new topic. The national background reports and some case studies illustrate that a certain proportion of initiatives prefer rather young volunteers. For example, older people are still seen as recipients of voluntary services, but not always as possible voluntary workers. This often corresponds with a lack of political awareness of the potential of older people in general.

**Different public relations approaches**

A minority of the case studies analysed feature a systematic recruitment strategy. The range of approaches varies from comprehensive public relations efforts to virtually no active attempts to recruit new volunteers. Some initiatives even use different forms of public relations at the same time, such as publishing their own newspapers and websites (LV2). Furthermore, they try to be present in other local print media and organise events to increase their popularity. Others hand out leaflets to surgeries or libraries or cultivate and maintain relationships with religious and ethnic communities as well as community centres (UK1). Sometimes the professional staff are responsible for recruiting new volunteers, but in some cases volunteers make an effort to attract new members.

**Case study (LT1)**

With 45,000 members, the Lithuanian Union of Pensioners is the largest organisation of older people in Lithuania. The union issues a regular newspaper to inform members about its activities, which include voluntary services as well as advocacy and events. Relevant information that is particularly interesting for older people is prepared in cooperation with the Ministry of Social Security and Labour. Articles written by union members are also published.



### **Social network**

In some cases the majority, or at least a significant percentage, of volunteers learn about an initiative from their social networks rather than from advertisements or brochures and this fact seems to be independent of the country-specific significance of voluntary work. The importance of social networks becomes apparent both in countries such as Lithuania, where volunteering is in a rather early stage of development, and in countries like the UK with a strong tradition of volunteering, where the majority of citizens are at least familiar with the subject of voluntary work. Still, word-of-mouth recommendations play a crucial role.

### **Aspects of the organisation**

Some well-established organisations also benefit from their high prestige, resulting in sufficient voluntary applicants (HU2). Those initiatives are less dependent on comprehensive and often expensive and time-consuming public relations. A further group recruits their volunteers from participants in their own programmes. Members of self-help groups, attendees of lectures and participants in social events become interested in making a commitment because they are satisfied with the services they received from the organisation (FI1). In general, the inhibition threshold can be lowered if initiatives provide premises with a welcoming atmosphere.

#### **Case study (NL3)**

In the framework of the Ageing Differently initiative, older volunteers organise work groups for other older people with topics of individual choice. Originally, many of the voluntary group leaders came as visitors to the meetings and were encouraged to take up a responsible position. To attract new visitors and volunteers, the initiative attached great importance to meeting in pleasant environments. Furthermore, it is part of the self-concept of the groups that all participants can contribute to making the meetings a success.

### **'Indirect' recruitment**

A small proportion of initiatives do not aim at encouraging older people to volunteer; volunteering is instead a 'side effect'. The main aim of these initiatives is to promote active and self-determined ageing. They invite older people from different social strata to think and talk about their expectations with respect to different aspects of ageing as well as to support each other. In this connection, voluntary work is suggested as a possible way of doing something for oneself and for others (DE2).

### **'Gatekeepers'**

The case studies illustrate that it is a challenge to reach those who are not yet involved. One programme (UK1) tries to recruit those groups by initially recruiting 'gatekeepers'. A gatekeeper is usually already participating to a certain degree and therefore bridges the gap between the initiative and those who are socially excluded, for example by inviting family members, friends and neighbours to volunteer.

### **Preparatory courses and empowerment**

The case study material reveals that vulnerable older people in particular are often not aware of their competences and think that they have nothing to contribute as volunteers. Thus, they do not consider themselves as qualified applicants for voluntary work. Preparatory courses can succeed in involving these people by, firstly, helping them to see their life experience and supposed ordinary skills as valuable preconditions for volunteering (HU3). Secondly, these courses can support a way of re-orientation subsequent to a critical life event, for instance retirement (DE2) or loss of a family member (FI3).

## Retention of volunteers

### Attention to older volunteers at risk

Regarding the retention of volunteers, only a few cases used specific strategies to permanently involve volunteers, especially those from risk groups. In general, carrying out voluntary work successfully and satisfyingly contributes to retention. Also, if volunteers benefit from their voluntary commitment they will be more likely to continue volunteering.

### Training courses

An important precondition to enjoying voluntary work is that volunteers undertake only those tasks they are able to perform. Many initiatives try to ensure this by carrying out an assessment of volunteers' skills (HU2) and by offering special training courses. These measures ensure the older people are prepared for new challenges related to voluntary work (LV2). However, the case study material illustrates that ongoing training in most cases requires professional support and thus paid workers (see Chapter 5). The provision of training by experienced volunteers (FR3) seems to be less widespread.

The content and amount of training varies according to the voluntary tasks and the volunteers' individual needs. For example, the older people attend courses on first aid or communication with depressed people, or gain knowledge about health behaviour (UK1). The newly acquired knowledge is useful and often a valuable precondition to their work with the recipients of the service. In addition, training on networking, group communication and conflict management prepares them for their commitment in a group of volunteers (NL3).

#### Case study (FI2)

Older hearing-impaired members of the Finnish Federation of Hard of Hearing offer voluntary counselling for other hearing-impaired persons. They help with technical aid and inform about entitlements from the health system. To ensure that the volunteers are up to date on the latest hearing aid technology, they need training on a regular basis.

### Information, counselling and social events

Apart from training courses, some initiatives provide their voluntary staff members with information. A Dutch initiative (NL3) developed a so-called 'inspiration folder' with suggestions on topics for group meetings. Many initiatives also provide their volunteers with regular counselling. As a result, they learn how to handle difficult situations and are less likely to give up their work prematurely. In addition, social events for volunteers which include the exchange of information, for example by inviting guest speakers, is widespread (UK1; FI2).

### Esteem and recognition

Esteem and recognition are of prime importance for the retention of volunteers, especially if they are at risk of social exclusion. There are examples where initiatives succeed in establishing a culture of recognition for volunteers in their day-to-day work (NL3; DE3). Furthermore, organising social events for volunteers is a way to show appreciation of their commitment (UK3). The importance of public esteem and recognition on the political level (HU1) is frequently reported. Offering awards for voluntary organisations, sometimes even on the national level, can also be regarded as a form of appreciation and thus can help in the retention of voluntary workers (IT2).

### Aspects of flexibility and self-determination

If the organisation gives the volunteers some leeway, they appreciate the opportunity to decide on the extent of their commitment. This is in line with the trend in 'modern' social volunteering (DE2) to determine the frequency and duration of voluntary work; in other words, project-based, rather than long-term, commitment. However, it must be taken into account that more flexibility for volunteers is often linked with more organisational effort for the stakeholders (UK2).

In addition, having the chance to participate in the process of developing a programme also assures volunteers that their experiences and competencies are recognised and valued (HU1; DE3). Several initiatives arose from grassroots level and thus considered the ideas of committed older people. Self-determination is also guaranteed if volunteers independently set the agenda of their activities while the programme is initiated by professionals. In several cases, groups that are led by volunteers were once initiated by professionals and nowadays act rather autonomously. For example, committed older people are responsible for organising group meetings and for selecting topics that respond to the needs of the target groups (NL3).

### **Provision of insurance and expense allowances**

To retain volunteers, specific provision of insurance to cover volunteers, as well as expense allowances, play a crucial role. Initiatives with insufficient funding and without links to an umbrella organisation cannot afford to reimburse costs for volunteering, for example public transport costs. In these cases, the volunteers have to bear the expenses themselves (FI2). For older people with little money, for example in Latvia or Lithuania, this is a particular challenge and might prevent them from becoming or remaining active volunteers (LT1).

## **Content and target (groups) of voluntary activities**

### **Composition of target groups**

Even though the case studies represent intergenerational (NL2; FR3) as well as intragenerational (IT1) projects, the latter are more heavily represented. In some cases, the volunteers themselves belong to the target group of the initiative – for example, former family caregivers or widows and widowers (FI1) – and thus share their experiences.

#### **Case study (FR2)**

A group of retirees from the Young Elders from Nancy initiative are invited to visit companies and authorities in the region to talk with older employees about their impending retirement. Experiences are exchanged and ideas are given on how to structure the new phase of life, for example by voluntary commitment.

### **Fields of activity**

The character of voluntary work varies considerably from case study to case study. While some of the measures included concentrate on a small range of activities (DK2), other measures offer their volunteers diverse tasks (HU1). Annex 1 gives a brief overview of the variety of voluntary engagement in the respective initiatives and shows that the fields of engagement of many volunteers go beyond the traditional age-related topics.

Voluntary work in the field of health and social services, which includes face-to-face contact with other people, is widespread. This means, for example, caring for frail or disabled people. In addition, assistance services for children or older people, driving services and home visits for isolated people with limited mobility are very common. Many measures also offer support, advice or just conversation for lonely people via telephone (IT2). With respect to volunteers and recipients of the services, this approach seems to be very promising, particularly in rural areas.

However, there are many further examples of other popular fields of activity, such as education, lifelong learning and culture (LV2; DE3; NL2). In several measures, volunteers impart their knowledge about specific topics (for example, local cuisine, languages, health, new media) to attendees of training courses or participants in group meetings (FR1). Others organise holiday trips, cultural events or stage plays, or prepare informative meetings on various subjects.

**Case study (HU1)**

The Hungarian Újbuda Community Development Programme is a good example of how various ideas for the participation of the elderly can evolve in the context of a programme. Voluntary work comprises a wide range of activities, such as courses in computer literacy, staging plays which were written by the volunteers themselves, organising a Senior Creative Camp where participants can learn the basics of various arts or publishing books like *Granny's Tales*.

A significantly smaller proportion of volunteers are engaged in organisational tasks (UK2; DE1; IT3). Either they assist professional project managers by coordinating programmes, public relations and the recruitment of new volunteers or, especially in smaller initiatives that arose from grassroots level, are solely responsible for organising tasks. Furthermore, some volunteers are active in the area of local interest groups. They identify people with specific needs in their neighbourhoods or districts, gather information about their situation and then try to call public attention to their problems (LV1).

**Case study (FR3)**

The French initiative Read and Let Them Read has evolved into a national project with more than 12,000 volunteers. People in the age group 50+ offer reading workshops to children and teenagers. The primary intention is to stimulate interest and excitement in reading so that, in the long run, the young people's reading and writing skills improve as a side effect.

## Effects of volunteering on older people

### Expansion of networks

The majority of case studies illustrate how older volunteers enter many new relationships with other volunteers as well as with those who benefit from their commitment. In some cases, relationships have even turned into friendships (UK3). Volunteering can enhance the number of social ties a person has. This is especially crucial for older people who feel lonely and isolated. Furthermore, volunteers from intergenerational projects report having a closer relationship with younger people, which is promoted by their voluntary commitment. This can affect relationships both outside of (NL2) and within the family (FR3).

### Increased feeling of being needed

Especially after the transition from paid work to retirement, but also after the phase of caring for frail parents or for children ('empty nest phase'), people are looking for re-orientation (FI3). Tasks and obligations which have structured their lives for many years or even decades fall away. Taking up voluntary activities helps regain a meaningful occupation and, in some cases, even a desperately needed new perspective on life.

**Case study (LV2)**

'After retirement or in case of unexpected disability a person discovers that he/she suddenly becomes useless and begins to feel discomfort. Becoming a volunteer is an opportunity to rediscover yourself, to help others, to try something new in your life thereby helping yourself to find something for your soul, to experience the joy of giving to others, to feel needed, to be with people and not to feel excluded. [...] This is not just nice words, but reality, proven by my own experience of becoming a volunteer after retirement and sudden disability.' (69-year-old volunteer)

### **Strengthening of self-esteem**

This is especially true for those older people who have been marginalised their entire life, for example because of a low educational level, disability or ethnicity. Therefore, encouragement and empowerment are crucial preconditions for their involvement. Hence, some initiatives focus their recruitment strategies on those older persons who firstly have to recognise their own given experience of life as well as supposed ordinary competences as valuable preconditions for volunteering (HU3).

### **Development of new skills**

Many initiatives emphasise the training of their volunteers to qualify them for new tasks (LV2). People who are active volunteers find that they are still able to learn and that they can use their newly gained competences to the benefit of others, despite their age, poor health or other individual obstacles.

### **Becoming aware of the ability to change things even in old age**

Volunteering undermines negative age stereotypes, even those held by older people themselves. Many older people discover that, in the framework of an initiative, they can contribute not only to the improvement of living conditions on the individual level, but also to social cohesion (LV2). Hence, they become 'productive' in terms of active ageing (compare Chapter 1). Beyond that, many older volunteers become more sensitised to social problems and learn how to fight social exclusion on an individual level as well as on behalf of others (IT2; LT1). Many volunteers improve their knowledge about their social rights and learn how to claim them, for example from local authorities or the health care system.

### **Interest in additional voluntary activities**

Several case studies show that volunteers not only take up tasks for the initiative concerned but also subsequently become active for other organisations (NL3). Consequently, the recruitment of older volunteers can initiate a process of increasing societal participation.

#### **Case study (DK1)**

The Elderly Helping Elderly project engages a constantly growing staff of volunteers (about 3,500 in 2006) aged 60 years or over. The volunteers support other older people by visiting or offering shopping services as well as computer and sports programmes. They are also strongly encouraged to take over further voluntary activities for other initiatives. An evaluation of the project found that 76% of men and 73% of women were encouraged to take up another commitment (Ældremobilisering, 2005).

### **Improved state of health and well-being of volunteers**

Older volunteers become more active, establish more social ties and feel useful and self-confident. This effect is, in some way, reported in nearly every case study. In addition, their voluntary work has a direct effect in the context of health promotion: older people gain knowledge about nutrition, living with impairments such as diabetes and the importance of sports in old age (UK1).

## **Financial resources of the initiatives**

### **Fundraising**

The amount and period of funding found in the different cases ranges from long-term funding to project grants and sporadic funding. However, the permanent struggle for financial resources is characteristic for the majority of the initiatives. Exceptions are those programmes that require only a small amount of funding (PL3) and those that generate their own sources of income (NL1). However, ongoing efforts to raise funds are more common. As long-term funding is

scarce, fundraising activities themselves are expense factors if initiatives have no access to outside expertise, for example from professionals in umbrella organisations. Thus, volunteers are often heavily involved in fundraising (HU2).

### Public funding

In general, most initiatives involved in this study are funded by a mixture of different sources (FR3). Local authorities are crucial as a source of financial support (PL2). Their contribution varies from single grants to regular funding of various amounts. Funding is not only received from the local community level, but also from the state level. Some case studies report on financial support from ministries, public funding and specific state programmes for volunteer work (DK3). In addition, EU funds (especially in Hungary) play a vital role, as do grants from foreign ministries (LV2) and foreign foundations.

#### Case study (DK3)

The Spare Grandparents programme in Copenhagen was founded by a private initiative in 1996. Older volunteers were recruited to support parents, particularly single parents, with childcare. The programme is financed by the local authority of Copenhagen, which in turn receives subsidies from the Federal Ministry for Family Affairs.

### Tax relief and other financial resources

In some countries the tax law generates an additional, albeit rather small, funding source. For example, Lithuanian citizens can allocate a specific percentage of their taxes to be used for a non-profit organisation. Tax relief for donations to charitable organisations, for instance in Germany and Latvia, are appealing to sponsors (whether private citizens or companies). However, what is more important is that some initiatives charge small membership fees (FI2), while other initiatives ask for small contributions from the recipients of their services (FR1). Proceeds of public social events are also used for funding. Further grants come from associations and awards, which are connected with prize money, are mentioned as well. In some cases, inheritances contribute to the funding. Additionally, membership in an umbrella organisation often includes access to financial resources (PL2).

### Infrastructure of the measures/initiatives

#### Material support

Nearly every case study reports that voluntary work needs rooms, either for administrative tasks and staff meetings and/or for provision of services. In some cases, initiatives have access to rooms or offices from local authorities at no charge (PL1). With the aid of foundations some initiatives have even been able to buy their own houses and adapt them to their specific purposes (LV1). Some local authorities pay the running costs (for example, gas and electricity) for the initiatives' premises.

Other types of material support also exist. For instance, a local authority or a company loans a car to an organisation or a bank provides an account free of charge. In another case, software to analyse data for quality assurance was donated (IT1). There is also an example of a local authority which provides the association and its volunteers with free admission to fitness centres (FI3).

#### Specialised staff

The majority of the initiatives analysed employ professional staff members, mostly part time. Their tasks vary from organisational work to fundraising and recruitment of volunteers. Skilled employees are most commonly involved in programmes that require training and counselling for volunteers (FI1). As paid work depends on long-term financing, the initiatives employing paid staff are more dependent on funding and more often confronted with insufficient financial

resources (IT1). In many cases, this leads to an overburdening of professionals. Even though their workload increases, they are not given a corresponding pay increase.

In some cases, initiatives hesitate to extend their range of services because this would require additional training of volunteers and thus more expenses for professionals (PL2). Against the background of limited or insufficient financial resources, some initiatives fall back on the expertise of other organisations. Some initiatives, for example, have access to the support of professionals at umbrella organisations.

### **Case study (PL2)**

The Polish organisation Little Brothers of the Poor sets itself the goal of counteracting the social isolation of older people. As members of the international federation of Little Brothers, 65% of their annual budget, amounting to €80,000, is financed by the French branch of Little Brothers. The three Polish branches in Warsaw, Poznań and Lublin each employ one part-time employee coordinating the volunteers. Moreover, a total of three salaried employees are assigned to various projects on a part-time basis. The full-time coordinator of the three branches is also responsible for marketing.

## **Networking and cooperation**

### **Degree of networking**

While many initiatives are linked with a high number of partners from the political and social sector as well as businesses, other organisations have no comparable networks. In some cases, a low level of networking results from the intention to act as independently as possible. Other initiatives try to establish cooperation, but progress is slow. The different types of networking represented in the case studies are as follows.

### **Links to public bodies**

Networking with local councils is prevalent among the case studies. In a few cases, the cooperation not only includes the local authorities but also central government departments, for example ministries. Mostly local councils and initiatives work together with respect to the provision of funding (see Chapter 5). The provision of premises or other material resources from municipalities to initiatives is a second field of collaboration. In addition, local councils are often involved in the further development of programmes, for example by providing initiatives under the guidance of professional staff such as social workers. Local councils also contribute to the expansion of the initiatives' networks and facilitate the establishment of new relationships with other public bodies. Beyond that, networking with local councils can help an initiative to draw political attention to social inequality and to place its aims on the political agenda (DE3).

It is not only initiatives that profit from cooperation with local councils or municipalities. The latter might benefit as well. For instance, municipalities use the successful work of a well-known organisation/initiative as an advertisement for their regions (PL1). And it has to be mentioned that against the background of cuts in the welfare system, several initiatives bridge gaps in service provision that local authorities are not able or willing to fill (IT1).

### **Case study (PL1)**

The Council of Women association is active in an agricultural region in Poland. The members are working towards the preservation and dissemination of local customs and traditions (for example, regional recipes). Since local politics focus on the advancement of farm tourism as a locational factor, the activities of the association are perceived as promotion and are therefore supported by local authorities.

### Links to umbrella organisations

Many of the initiatives analysed are linked with umbrella organisations. Their professional staff members arrange meetings and training courses for volunteers (NL3). Local measures benefit from the umbrella organisations' know-how, their infrastructure and financial resources (PL2). In some cases, umbrella organisations assume responsibility for public relations and facilitate networking because of their numerous contacts. What is more, a linkage to umbrella organisations often enables local initiatives to provide their volunteers with insurance (UK3). Despite these instances of the advantages of cooperation with an umbrella organisation, it cannot be concluded that the lack of linkage is a disadvantage: some initiatives regard their independence as a promoting factor because it can contribute to a greater identification of volunteers with the initiative's targets (NL1).

### Links to non-profit organisations

Other frequently mentioned partners are non-profit organisations (FR3), mainly working in the social sector (DE3). Networking often involves self-help groups which deal with related topics. Forms of cooperation range from the exchange of information (for example, about their respective activities or about the needs of their target groups) and shared meetings to the provision of facilities. Sometimes the expertise of bigger non-profit organisations is used in the framework of fundraising activities, for example regarding proposals for grants (IT1).

### Other network partners

Some identified networks comprise actors from the health care sector. For example, doctors give lectures to volunteers or a health care centre provides an initiative with store rooms. As the professional health care sector benefits from the experience of the initiatives, this cooperation can be described as mutual support. Further networking may include schools and colleges (for example, in case study FI3 students wrote a thesis on a voluntary project), religious communities (IT1), companies and libraries (NL3). Overall, cooperation facilitates the training of volunteers in different fields of expertise, for example with respect to conflict management or computer literacy (cooperation with an educational institution). It also supports public relations and, consequently, the recruitment of volunteers.

## Initiators, size and geographic framework of initiatives

### Non-profit organisations

Even though some initiatives were started independently of any political or organisational framework, it goes without saying that well-established non-profit organisations constitute a significant proportion of initiators. They systematically recruit volunteers to carry out a given task (HU2).

### Public bodies

Very often the initiation of a volunteer programme made cooperation between different stakeholders necessary. There are examples of collaboration between foreign ministries and city councils (LV2) as well as between a city council and scientists (HU1). Local governments play a vital role in the process of founding new programmes. Although their contribution to the voluntary sector is mandatory only in certain cases, they can be considered as important initiators and promoters of volunteering programmes.

#### Case study (HU1)

The mayor of a large district of Budapest started the Újbuda 60+ Community Development Programme to create a community of active elderly people. Sociologists and experts on social policy helped develop the programme. With the aid of EU funds (Q-Ageing Central Europe), the programme was extended to include various intergenerational and intragenerational offers.



### **Grassroots initiatives and other organisations**

Many initiatives, some of which grew from the grassroots level in that they were founded by the volunteers themselves, are also linked to umbrella organisations such as older people's federations, interest groups, volunteer organisations and other associations. Only in two cases did trade unions (IT2; DE2) or religious communities act as (joint) founders.

### **Size of organisations/initiatives**

The organisations/initiatives varied widely in terms of size. Big non-profit organisations with many members and branches, in some cases even in different countries, are represented. But the case studies also include small initiatives with only a few volunteers. While the Hungarian Maltese Charity Service (HU2) has 3,000 regular and 10,000 occasional volunteers, there was a small Dutch project where just 18 volunteers staged a play (NL2).

### **Geographic framework**

Some programmes focus on both rural and urban areas, while others concentrate on one specific district. The case studies show that the content of volunteering programmes has to be adapted to the geographic framework. An example from Hungary (HU3) points out that tackling loneliness, which was of high demand among elderly people in urban districts, was not a topic of priority for volunteers in a rural settlement: those residents were interested in gaining knowledge and new skills.

Some cases show that traditions are sometimes still more important in rural areas; hence programmes have to take this into account (PL3). Relationships between citizens are often more close than in big cities. In comparison with urban areas it seems to be easier for initiators to define the priority needs and relevant fields of activity. Keeping local traditions alive through volunteering is a promising way to involve older people in rural areas, especially those at risk of social exclusion.

# Lessons from the case studies 7

## **Political and cultural framework**

Whatever the age of the volunteer, the likelihood that someone will get involved in voluntary work, as well as what kind of work and to what extent, is highly dependent on the political and cultural framework. Thus, political instruments can significantly facilitate the involvement of older people as volunteers in the following ways.

### **Establishing a comprehensive senior policy at local, national and EU levels**

With respect to older volunteers, acknowledging the competences of older people, particularly if they are no longer part of the workforce, is an important precondition. Therefore, the social inclusion of older people through volunteering requires a comprehensive policy on older people, based on the idea of active ageing (see Chapter 1) at all political levels. A policy focusing on volunteering will also ensure sustainability by avoiding frequent changes in direction.

### **Creating supportive framework conditions**

Because policy in the majority of the participating countries calls for an increased commitment from older people, the provision of a corresponding supportive framework has to be ensured (especially with respect to funding). At the local level, support from the authorities is crucial as well. Apart from funding (see ‘Structural–organisational aspects’, below), municipalities can foster the work of initiatives, for example through public recognition, networking activities and providing facilities.

### **Introducing a basic legal framework**

In addition, volunteering requires at least a basic legal framework. Initiatives, as well as the volunteers themselves, need binding information about their rights and obligations. A legal framework is a crucial precondition for the provision of insurance for volunteers. Nevertheless, too much bureaucracy and paperwork might hinder the development of initiatives, especially if professional project management is not in place. Potential older volunteers may also be put off by highly formalised structures. A well-balanced approach is therefore needed. However, this applies to volunteering in all age groups.

### **Paying attention to the specific (political) background**

Special endeavours are necessary in some former socialist countries. Here, the idea of civil society is still in its infancy. Consequently, older people in particular are often reluctant when it comes to volunteering in an organisational framework. To overcome barriers like this, initiatives have to be adapted to the country-specific cultural background.

### **Recognising the diversity of older volunteers**

There is no universal approach to include vulnerable older people through volunteering. Diversity within the group of older people has to be taken into account and programmes have to be adapted to it.

### **Assurance of retirement income and prevention of poverty**

Poverty negatively affects the extent of voluntary work of (older) people in many ways. It is well known that poor older people generally also have poorer health, and poor health is one of the main obstacles to their willingness to volunteer. Therefore, national policies must act on income security and poverty prevention as well as on health promotion and health protection regarding older people.

## **Structural–organisational aspects**

Reliable long-term funding can facilitate the development of programmes and ensure their sustainability. Furthermore, initiatives with sufficient funding can provide their volunteers with professional project management as well as with training and continuing counselling – important promoting factors for the involvement of older people, especially those

at risk of social exclusion. Appropriate funding for volunteering programmes is difficult to achieve. On the one hand, both central and local government are squeezed for funds in a time of recession. On the other hand, continuous and comprehensive fundraising activities require (paid) staff and time resources.

### **Ensuring long-term financial support**

Depending on the size and content of an initiative, voluntary work requires financial resources in one form or another. The case study material demonstrates that regardless of any other barriers they may face, initiatives and organisations mostly have to deal with financial issues to be both successful and sustainable. Despite comprehensive fundraising activities which bring in money from various sources, financial support from the EU, state or municipalities is crucial. Tax laws are an interesting instrument that can be used for funding. Although project-based funding can be helpful to initiate new projects and programmes, long-term funding is needed to ensure sustainability. Additionally, a mixture of different financial sources enhances the independence of initiatives from potentially unreliable sponsors.

### **Insurance for volunteers**

To ensure the safety of volunteers, adequate insurance has to be provided. Moreover, a comprehensive legal framework for voluntary activities is required. In some countries featured in this report, such a network is either nonexistent or only partially established. Being linked to an umbrella organisation increases the probability of insurance provision. If obtaining insurance requires extensive bureaucracy, it might impede the development of small initiatives. Thus, relevant legal regulations have to be transparent and easily implementable.

### **Providing expense allowances for volunteers**

Reliable long-term funding is a precondition for the provision of allowances for volunteers as well. The payment of expense allowances is particularly important for both older people at financial risk and for countries with few financial provisions for pensioners. In both cases, paying expense allowances can lower the threshold for their involvement, but it should be a matter of course in any event.

### **Using different ways to improve fundraising**

To improve the financial situation of an initiative, funding programmes have to be transparent and made public. Fundraising can also be made easier when an overview on existing grants and awards is provided (for example, via an internet database). Lastly, initiatives should consider whether they could partly contribute to their own funding, for example by self-organised social events or by ‘selling’ their services.

#### **Case study (NL1)**

The Together We Continue programme focuses on improving the welfare of older and disabled people in a Dutch municipality with 30,000 residents. For instance, they offer driving services, home visits and household chore services. In addition, the initiative has a second-hand shop with a small café. The earnings from this contribute significantly to the organisation’s funding.

## **Recruitment strategies**

Recruiting older people at risk of social exclusion as volunteers requires special effort and this applies in particular to those who have not been active volunteers in the past. Initiatives need to tailor their recruitment strategies to the characteristics and demands of risk groups.

### Obtaining information about the target group

Detailed knowledge about the living conditions and other characteristics of the target group enormously facilitates recruitment. Initiatives should gather information about the special needs of future volunteers and integrate that information in special recruitment strategies.

### Using successful strategies

The following strategies have been used successfully to acquire (socially excluded) volunteers: to recruit them from the group of ‘customers’, to use less vulnerable volunteers as promoter, and to recruit volunteers from ‘narrow’ social networks like family, friends and neighbours. Although word-of-mouth recommendations seem to be better (and a lot cheaper) than written material, comprehensive advertisement and public relations campaigning is most useful for recruitment, and this particularly applies to isolated older people.

### Building on previous experience and personal concern

The recruitment of volunteers is even more effective if it appeals to personal concern. This concern may be based on past experiences of the volunteers. Just the feeling and knowledge that one has received assistance and support in a difficult situation is a motivating factor in wanting to give something back to other people as part of a voluntary commitment.

#### Case study (FI3)

The Oulu Association of Caregiving Relatives offers support for ex-caregivers who are re-orienting their lives after the death of a spouse or after the care recipient had to move to institutional care. In addition to peer support, the project includes a so-called Joy of Life Empowerment Course. The course consists of three modules where the participants reflect on their past, present and future. Participants are encouraged to become volunteers, for example by drawing on their life experience to support other (ex-)family carers.

## Public relations

There are various ways to spread information about the content and target of an initiative. A professional (but expensive) public relations strategy, which includes different channels and initiatives aimed at developing a ‘brand name’, can increase awareness of the initiative not only among potential volunteers, but also among potential sponsors.

### Applying different public relations strategies

Some organisations publish their own newspapers, are represented on the internet and/or provide leaflets and brochures. Networking with other local stakeholders and other voluntary organisations is another option. Furthermore, initiatives need to promote outreach work (for example, attending get-togethers in community centres or establishing relationships with gatekeepers) and have to look for support from well-known local policymakers.

#### Case study (UK1)

A programme in the UK uses a ‘snowball effect’ for both increasing awareness of the content (health promoting) of the programme and recruiting new volunteers. The starting points are existing groups, for example in community centres and sheltered accommodation. Participants are invited to join short workshops on nutrition as well as on physical and mental health in general. Interested people are trained to become Senior Community Health Champions who spread their knowledge in their communities. In addition, Super Champions become regularly involved in an organisational framework. This word-of-mouth strategy succeeds in involving a high proportion of migrants.

## **Counselling and training of volunteers**

The training and continuous counselling of volunteers is identified as a promising factor in the recruitment and retention of older people at risk of social exclusion. Therefore, initiatives should place special emphasis on these two aspects. This applies especially to organisations that provide their volunteers with a high degree of self-determination. For example, skills in project management and conflict management are crucial for successful self-determined work.

### **Offering preparatory courses**

Preparatory courses facilitate the involvement of older people (at risk of social exclusion). For these courses to be successful, it is important that their content and timeframe is harmonised with the volunteers' individual needs and with the fields of future activities. They should aim to help older people to become aware of their skills and competencies.

### **Offering continuous counselling and training**

In order to retain volunteers, it is also important to organise continuous counselling and training. Counselling can enhance people's skills as volunteers as well as help them solve problems that might occur during voluntary activities. In this connection, it has to be kept in mind that an indispensable prerequisite for good counselling is professional support, which in turn requires financial resources.

#### **Case study (HU3)**

A Hungarian case study reports on the successful programme Sustainable Learning in the Community (SLIC), which receives EU funding and was implemented in six EU Member States. The programme includes two days of training for older people, where, among other things, they are encouraged to explore unrecognised skills, for example cooking. One-third of the participants up to 2010 immediately took up voluntary work.

## **Self-determination, esteem and recognition of volunteers**

The so-called 'new' type of volunteering corresponds to a growing demand for self-determination among volunteers of all age groups. A culture of esteem and appreciation is also a promoting factor for the retention of vulnerable people in voluntary work. Both aspects can be put into practice with the following recommendations.

### **Creating flexibility in voluntary activities and options for involvement**

Flexibility facilitates the involvement and retention especially of older people with poor health or with family obligations (for example, caregivers). Actively involving volunteers, for example in the development of a programme, also gives them a voice and enhances their identification with their tasks. However, a good combination of self-responsibility and self-determination is important, with continuous professional advice and training to avoid overburdening volunteers who are unfamiliar with this way of working.

#### **Case study (DE2)**

A German project (ZWAR) focuses on the social participation of older people in the transition from paid work to retirement. In a certain community, all residents aged 50 years and above are invited to an initial meeting. Interested people are encouraged to found a group and work on a self-chosen topic. The professional staff supports those groups in organising themselves but does not influence the content of their activities. The group members also decide on the extent and duration of their commitment to the project.

### Creating a culture of appreciation

A culture of appreciation can be established with little effort, for instance by means of thank you notes provided by the project management. Regular social events at the local level are also a way for organisations to show their esteem. These events may, for example, be connected with a prize for the volunteer of the year. Volunteer awards at the national and EU levels could also contribute to their recognition.

#### Case study (DE3)

An association in Germany aims at the integration of resettlers and quota refugees from the territories of the former Soviet Union. Many older volunteers are involved in a wide range of activities that are mostly developed by the migrants themselves. A basic principle of the association is that ‘everyone can contribute something’. This is of special importance for the volunteers who have experienced a lack of social appreciation and, to a certain degree, discrimination as well. Against this background, recognising and appreciating their competences is a fundamental factor for motivating even those who have not volunteered so far.

### Including older volunteers with poor health

As one of the most important dimensions of social exclusion in old age, poor health status is the most frequently mentioned obstacle to volunteering and therefore should be taken into serious consideration on different levels.

#### Paying special attention to older volunteers with poor health

Most initiatives focus their recruitment strategies on rather healthy and mobile older people and do not offer tasks for impaired or disabled volunteers. Initiatives need to be better prepared for the heterogeneous group of frail or disabled older volunteers and should pay more attention to their competences. Initiatives should also offer more flexible forms of involvement in accordance with the restricted health status of volunteers (in terms of frequency and duration, for example).

#### Case study (UK2)

A project in the UK targets disabled (older) people as volunteers. Their expectations, competences and disabilities are accurately assessed before the project managers suggest an appropriate voluntary activity in a collaborating organisation. Possible tasks include doing household chores for people in need, oral history projects, telephone support for lonely people and recruitment of new volunteers. Indeed, volunteers with physical or mental health problems need comprehensive support from the professional staff of the project. But the effects of their voluntary activities on their physical and mental well-being are striking.

### Accessibility of initiatives/organisations

The premises of an initiative are of particular importance, in particular for older people at risk of social exclusion, and therefore need to be adapted to their special needs, motives and characteristics.

#### Creating a welcoming atmosphere

Access for new volunteers is easier if the premises are in the form of an open meeting place where everybody is welcome and where the atmosphere is informal and friendly. Also, being familiar with an organisation, its programme and its volunteers (for example, in the case of people who formerly benefited from the volunteer service) can also lower the inhibition threshold for new volunteers.

### **Placing the setting in the middle of the target community**

With respect to infrastructure and the geographic framework, the initiative's premises should be located in the middle of the target community and/or as easily accessible and barrier free as possible. Travelling to the premises should be reduced to a minimum and public transport should be available.

#### **Case study (LV1)**

After much effort, the Saldus Town Pensioners' Federation succeeded in buying and successively reconstructing a house in Saldus, a small town in the west of Latvia with a high degree of poverty. Those premises have become more than just a popular meeting place for older people. The federation also provides them with shower facilities, laundry and hairdresser services. These basic facilities would otherwise not be affordable for the majority of the retirees. As the federation's house is highly important to older people, potential volunteers are likely to be familiar with it and therefore less hesitant to take up voluntary work there.

### **Sustainability**

Sustainability is both one of the key goals of voluntary activities and a basis for success. The case study material gives insight into key promoting factors.

#### **Ensuring permanent financial and infrastructural support**

The sustainability of an initiative depends heavily on funding and infrastructural support. Therefore, it is necessary to attract further funding streams by using innovative techniques.

#### **Maintaining professional and volunteering stability**

Staff stability can be achieved through motivation, incentives, ongoing training courses and by encouraging personal drive and enthusiasm. It is also helpful to demonstrate to volunteers that goals have been met.

#### **Regular evaluation of programmes**

The evaluation of programmes/initiatives from the start makes it possible to gain information about the programme's progress, to be responsive to the changing demands of the recipients of the service and volunteers and to face new challenges.

#### **Case study (FR1)**

The French Office for Retired and Older Persons from Belfort City and County (OPABT) is an umbrella organisation for 57 senior clubs and associations. Because there is now such a wide age range among retired people, OPABT adjusts its programmes to the new diversity of users and volunteers. This includes a systematic analysis of the demands and interests of the 'younger olds' as well as strategies to retain the very old.

### **Transferability**

Transferability is an important aspect of an initiative because it shows the extent to which the same result can be achieved in another setting. Many of the programmes analysed have been transferred beyond the boundaries of districts, in a few cases even beyond the barriers of nations (IT2). Some of the initiatives were founded in another district or even another country. To make transferability possible, a number of recommendations should be followed.

### **Adapting the initiative to local conditions**

The experiences collected so far show that the content and target of programmes have to be adapted to local conditions. This means, in turn, that the initiators of the measures have to be familiar with local conditions. They need to ask: what are the specific needs of the people targeted? Is there a culture of solidarity as a crucial precondition for voluntary work?

### **Facilitating public relations, dissemination strategies and networking**

To publicise the initiative, detailed information about detrimental and supportive framework conditions has to be provided through an effective public relations policy. Networking with other national and international organisations and/or their representatives is necessary to allow for a permanent exchange of good practice. Key actors both from the group of voluntary workers and the professionals should be involved in this.

#### **Case study (IT2)**

In the framework of an Italian initiative, older volunteers with increasing frailty provide help and support to other older persons living alone. A central part of the programme is a national free hotline where older people in need are connected with one of 120 counselling centres near their place of residence. The Silver Line idea has already been presented in Bulgaria, Romania, Latvia and Greece. The relatively low funding requirement facilitated its dissemination.

## **Outlook**

Regarding the future development of voluntary work of older people in Europe, it is expected that the number of volunteers will increase, though not to the same degree in all EU Member States.<sup>7</sup> On one hand, the individual preconditions for voluntary work ('cohort effects') have improved: older people in general usually have greater physical, psychological and material resources than previous generations. In addition, in terms of 'active ageing' there are even more elderly people prepared to use their skills and potentials within socially relevant fields of action. Moreover, a lot of older people are hoping to gain advantages from voluntary work, whether in terms of social contacts or increased self-esteem. On the other hand, there is a socio-political need to broaden the commitment of older EU citizens.

As the case studies have shown, the readiness to engage in voluntary work (in old age) is subject to certain framework conditions. For instance, a professional human resource policy has to be put in place by organisations wishing to attract older people for voluntary work. In this context, the heterogeneity and diversity of their life situations should be taken into account so that older volunteers feel neither unchallenged nor incapable with regard to voluntary work. This applies particularly to very old people and/or other groups of old people, for example those who may be at risk of social exclusion because of physical limitations or mobility barriers.

However, not all EU Member States have recognised the potential and skills of older citizens for voluntary work and thus have not initiated sufficient supportive measures. The main reasons for this are differences in country-specific historical developments of voluntary work and its importance; differences that are to some extent linked to the existing historical-cultural knowledge or economic power and social security contributions of a country.

<sup>7</sup> See <http://www.eurofound.europa.eu/resourcepacks/volunteering.htm>.



# Conclusions and policy pointers 8

In general, to promote civic engagement, a mix of four basic support strategies is necessary. This comprehensive finding is confirmed by the case study material. For each of the three levels considered here – that is, national and EU policy, local public authorities and organisations and initiatives – the four support strategies are of different importance.

1. Individual-based support strategies that directly benefit those committed to volunteering are significant for all three levels, but particularly concern levels two (local public authorities) and three (organisations and initiatives).
2. Collaborative support strategies aimed at improving cooperation, especially between full-time employees and volunteers, primarily affect level three (organisations and initiatives).
3. Community-based support strategies, in particular those that are building a comprehensive public infrastructure to support voluntary action and the mobilisation of interested individuals, are particularly relevant to the local level.
4. Finally, development strategies related to society that focus on the design of a support framework (for example, financial or legal) mainly cover the first level (national and EU policy).

Especially when it comes to the target group of older persons at risk of social exclusion, it is important that the relevant support strategies at each level are well integrated. It is mandatory to take account of the special life situation and motivation structure of the target group of older people at all levels. For analytical purposes, however, the recommendations related to each strategy are dealt with separately.

## Key messages for national and EU policy

- Voluntary work in the sense of active ageing (Chapter 1) not only influences the situation of individuals, but also contributes to social cohesion provided certain preconditions are met. Thus, the involvement of older people (at risk) should be promoted politically and embedded in a comprehensive senior policy at EU level, which should follow the concept of active ageing (Chapter 1).
- The exchange of good practice – with a special focus on voluntary activities that require fewer specific skills – across Member States is extremely important. Those countries that do not have a long tradition in volunteering could particularly benefit from such an exchange. Successful examples could be centrally collected in databases, available on the internet or presented at conferences.
- More cross-national research on the topic ‘legal and other barriers that discourage people from volunteering’ is necessary to reach those older people who are in principle willing to volunteer.
- European and national policy should encourage corporate social responsibility, including corporate volunteering. This would help to engage people coming to the end of their working life in volunteering.
- Volunteering programmes have to be accompanied by information campaigns at EU and Member State levels that illustrate the positive effect of voluntary work on older people in general, but especially on those at risk of social exclusion. The media should be actively involved. This is even more relevant when it comes to addressing risk groups at the national level. The European Year of Volunteering 2011 is an opportunity to raise awareness of the subject.
- Poor health is one of the most significant barriers to volunteering among older people. Therefore, long-term programmes for health promotion, particularly in old age, are required at the EU and national levels. In this context, the significant influence of poverty on health also has to be taken into account. Thus, national policies must act on income security and poverty prevention. This applies all the more because income poverty can be identified as one of the central inhibiting factors to civic commitment in old age.

- As volunteering is deeply embedded in the social and economic system of each EU country, country-specific, evidence-based guidelines would be helpful for the professionalisation of volunteering (for example, as it relates to the recruitment and retention of older volunteers).
- Volunteering of older people, particularly those at risk of social exclusion, has significant effects on subjective well-being and therefore fosters health promotion. Against this background, their involvement should be recognised as an effective instrument of health policy with respect to older people.
- National programmes to involve older people in general and especially those at risk of social exclusion as volunteers have to be developed, implemented and, if they already exist, evaluated and refined. Those programmes have to consider the heterogeneity of risk groups – in particular, regarding their life situation (*Lebenslage*), their cultural and regional background and their individual motivation to become volunteers. Programmes have to include all stakeholders who are relevant for senior policy as well as for volunteering policy at the national level.
- A successful and sustainable involvement of older people as volunteers is dependent on sufficient financial resources and a professional, secure infrastructure, which should be provided by the EU and/or the Member States. This includes professional counselling and support for volunteers. Municipalities as central partners on site, therefore, have to be stimulated and supported by according grant programmes.
- Project-based funding at EU and national levels is an important impulse to initiate new volunteering programmes. However, sustainable social inclusion of older people requires the availability of paid, skilled employees and thus at least basic long-term funding.
- Volunteering needs a reliable national legal framework. Insurance and expense allowances are essential, as well as an entitlement to further training.
- Interest in volunteering should be aroused as early as possible in life. Hence, national strategies should consider younger groups at risk of social exclusion as well.

### Key messages for local public authorities

- Municipal policy has to develop tailored approaches and strategies that are appropriate to meet the challenges of the demographic changes. Older people should be included in the development of such policy.
- Volunteering that involves older people at risk of social exclusion promotes social cohesion and quality of life in cities and municipalities. Against this background, the commitment of initiatives should be acknowledged and supported in terms of financial, material and personnel resources.
- Local authorities should promote initiatives to older people as volunteers by tendering grants or awarding prizes.
- Successful working initiatives enrich the local scope of services. Thus, they are effective in advertising a region or municipality and therefore should be seen as good public relations.
- Municipalities are major players in the provision and coordination of social services. In view of this, they should take up a key position with respect to networking between the different initiatives that are active locally. Promising experiences have been reported with central information centres, for example volunteering agencies in Germany.
- Volunteering requires acknowledgement. Municipalities can contribute significantly to a culture of esteem by giving awards or providing volunteers with discounts for access to public institutions.
- Volunteers support salaried employees but do not replace them. A basic understanding with respect to the cooperation between voluntary and professional staff should be determined by municipalities and communicated to their staff.
- Transnational networking with regard to voluntary engagement can promote the exchange of best practice. Bilateral twinning (twin cities) is another commendable instrument in this context.

## Key messages for organisations and initiatives

- The involvement of older people at risk of social exclusion as volunteers enhances the diversity of an initiative's staff. Their experiences enrich a programme, especially if they share experiences with the recipients of the services.
- Social exclusion in old age is heterogeneous. Hence, the involvement of risk groups requires tailored strategies that take their different problems and demands into account.
- Older people at risk of social exclusion often are more hesitant to recognise their own skills as competences than others. Low-threshold offers, which focus on the identification and acknowledgement of these competences, are promising as regards the preparation for voluntary work.
- Experiences of relevant stakeholders should be taken into account for the recruitment and retention of risk groups. This can be facilitated by regional and supra-regional networking.
- Volunteers at risk of social exclusion are experts on their own situation in many respects. Thus, they should be listened to when it comes to the development and implementation of new programmes.
- The topic of social exclusion should be explicitly considered not only with respect to recruitment, but also the retention of voluntary workers. Volunteers with poor health have to be provided with appropriate conditions of work.
- Like other volunteers, risk groups should neither be under-challenged nor overstrained. Their field of action should be accurately matched with their competences and their commitment should be accompanied with encouragement.
- Especially for older volunteers at risk of social exclusion, the accessibility of an initiative is of great importance. This concerns both the connection to public transport as well as barrier-free buildings.
- Regular and systematic evaluation not only contributes to an initiative's internal quality assurance, but potential sponsors may also appreciate the proof of successful work.
- Initiatives should focus on communicating their successes. Public relations strategies promote the development of a brand name which arouses the interest of future volunteers as well as of potential sponsors.
- Paid employees of initiatives need specific knowledge and skills for the recruitment and retention of older volunteers at risk of social exclusion. Thus, appropriate training programmes should be developed.
- Permanent collaboration between professionals and volunteers, especially if the latter are at risk of social exclusion, poses a challenge to all involved. Paid employees have to adjust to new partners who can no longer be considered just as clientele. Continuous education and training programmes should also take this aspect into account.
- A targeted use of technology (telephone, internet) expands the fields of activity for older volunteers with poor health. Initiatives should check their offers or services in order to identify corresponding options.

## Key messages for social partners

- To date, social partners have been insufficiently engaged in supporting voluntary activity. This applies to both unions and businesses and is true not only in relation to the engagement of older people, but in general. In view of the ageing of Europe's population, it is highly desirable to combine company retirement policies and planning with preparation for post-employment voluntary engagement. So far, only large companies in certain countries are known as good practice examples in doing this.
- Civic engagement can begin during a person's professional life. Skills and competence develop throughout an employee's career. It is essential to systematically promote civic engagement through training or further education at the company or the workplace.

- Social partners, companies and trade unions should encourage both their older employees and their retired members to take part in volunteering and thus contribute to promoting corporate social responsibility (CSR), which can be seen as a contribution of social partners in developing a modern social economy. This can be done at different levels; however, it is most effective at the local level.
- A company's contribution to a volunteering initiative can be both financial and non-financial. The latter refers, for example, to providing jobs or offering education and training measures, consultancy or technical and organisational assistance.
- The advantages of volunteering with respect to the transition from paid and/or family work to retirement should be fully recognised. Social partners should take advantage of their resources, for example through wage and salary agreements and labour-management contracts. In this context, the concept of partial retirement in particular is promising. In addition, other measures, such as grants or contests, are possible promotional instruments at the national level.

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# Annex 1: Brief overview of case studies

Identification	Country	Case study	Volunteers' tasks	Volunteers' age
DE1	Germany	Seniors Help Seniors (City of Minden)	Various activities aim at the prevention of the need for long-term care of very old people through mutual support. Tasks include shopping, visiting and driving services, organising events, programme planning and public relations work.	Average age is 85 years
DE2	Germany	ZWAR – Between Work and Retirement (North Rhine-Westphalia)	Members of a ZWAR group become voluntarily active in a self-chosen field. Their involvement is self-determined and mostly project oriented. Current trends of their commitment are intergenerational and housing projects.	People aged 50 years and above
DE3	Germany	Social Integration of Older Migrants (City of Mönchengladbach)	Resettlers and quota refugees from the former Soviet Union organise cultural, educational and recreational activities. Volunteers develop ideas and initiate corresponding subgroups.	Many older migrants
DK1	Denmark	Elderly Helping Elderly (nationwide project)	Voluntary workers support the weakest among older people through socialising, assistance services and physical exercise.	People aged 60 years and above
DK2	Denmark	Preventing Involuntary Loneliness (City of Odense)	In order to fight loneliness of older men living alone, volunteers offer their companionship in the framework of social and cultural activities.	Older men of various ages
DK3	Denmark	Spare Grandparents (City of Copenhagen)	Volunteers look after children while their parents are at work. They pick them up at the day care centre or accompany them on short trips.	Older retired people
FI1	Finland	Empowering Widowed, Divorced and Lonely Older People through Volunteering and Peer Support (nationwide project)	Former participants of coping courses act as voluntary supporting persons for widowed and divorced older people.	Mainly people aged 60 years and over
FI2	Finland	Local Volunteer Assistance for the Aged Hard of Hearing People (City of Kemi)	Hard-of-hearing volunteers run an assistance service. Users are trained in the handling of hearing aids and are advised about their rights with respect to social and health services.	Average age above 70 years
FI3	Finland	Oulu Association of Caregiving Relatives: The Peer Power Project (City of Oulu)	Former family caregivers run support groups for caregiving families. Some are voluntarily active as board members.	Average age above 70 years
FR1	France	Office for Retired and Older Persons from Belfort City and County (OPABT)	Volunteers are involved in the organisation of social events. Beyond that, they impart knowledge on computer literacy to other older people.	Retirees of various ages
FR2	France	Young Elders from Nancy – for Social Activity and Solidarity (JANUS)	Tasks include counselling for future retirees, support and chat for older people via telephone and training in computer literacy.	Older people of various ages
FR3	France	Read and Let Them Read (nationwide project)	Volunteers offer reading workshops for students in various age groups to promote both their delight in reading and their reading ability.	People aged 50 years and over
HU1	Hungary	ÚJBUDA 60+ Community Development Programme (district of the City of Budapest)	Voluntary work comprises a wide range of topics, for example courses in modern technology, crime prevention, a drama group, a talent contest. Many activities are based on the volunteers' ideas.	Older people aged 60 years and over
HU2	Hungary	Hungarian Maltese Charity Service (nationwide service)	Volunteers provide nursing for older people or mental care, visit sick persons in hospitals, chat with lonely people living at home, help with translations or provide legal advice.	50% of regular volunteers are over 60 years old
HU3	Hungary	Budapest Cultural Centre	Older people are encouraged to become volunteers in a self-chosen framework. For instance, they act as cultural mediator or join local communities and civil organisations to carry out voluntary activities. Their tasks vary from monitoring community internet points to organising events or recruiting other volunteers.	Age groups between 65 and 80 years
IT1	Italy	Older People Network (City of Carpi)	Main voluntary activities include transport services for older people, for example to the doctor or to go shopping. Beyond that, volunteers organise social events in community centres and provide companionship to older housebound people.	Age groups between 60 and 80 years

## Volunteering by older people in the EU

Identification	Country	Case study	Volunteers' tasks	Volunteers' age
IT2	Italy	Silver Line (nationwide project)	The variety of tasks includes helping older people living alone through driving services, support with household chores, shopping and recreational activities. Silver Line provides a free telephone number which connects older persons to the nearest counselling centre in case of need.	Age groups from 65 to 75 years
IT3	Italy	UISP – For the Great Age (nationwide project)	Volunteers undertake mainly managing and organising tasks of the initiative, which aims at health promotion of older people who have few relatives, poor health and poor living conditions.	53.3% of volunteers are aged over 50 years; a few are over 100 years old
LT1	Lithuania	Volunteer Organisation Lithuanian Union of Pensioners, Bociiai (nationwide project)	Voluntary workers organise cultural and social events or provide support services for sick or frail people. These services include assistance in nursing tasks, help with household chores and socialising.	Retirees of various ages
LV1	Latvia	Saldus Town Pensioners' Federation	Volunteers organise various cultural events, visit older people and tend to their needs, run a telephone help line and offer active learning services. Beyond that, the federation provides showers and laundry facilities for socially excluded people on its premises.	60% of the volunteers are aged between 65 and 75 years
LV2	Latvia	Volunteer Organisation ODIN/VITA (City of Daugavpils)	Voluntary activities include home care services for socially excluded people (older people living alone, disabled persons, unemployed people, etc.) as well as classes for children from social homes and for other interested persons.	50% of the volunteers are aged between 62 and 80 years
NL1	Netherlands	Together We Continue (Municipality of Culemborg)	Volunteers help improve the welfare of older people and disabled people by helping them to maintain an independent lifestyle. They provide driving and household chore services, as well as running a second-hand store including a small café.	Most volunteers are aged between 60 and 70 years
NL2	Netherlands	The Young Ones and the Once Young (County of Drenthe)	Volunteers staged a musical on intergenerational relationships.	18 volunteers aged from 12 to 80 years
NL3	Netherlands	Ageing Differently (City of Rotterdam)	Group meetings and informative events are organised by older people for older people. The topics are self-chosen and the groups act independently. Some groups target people at risk of social exclusion, for example homosexuals, older people with hearing loss and older people from ethnic minorities.	People aged 56 years and above; a significant proportion is aged 75 and above
PL1	Poland	Council of Women Association (Lubelski District)	Older women from rural areas promote local traditions (for example, traditional dishes) in the framework of regional and national events.	Older women aged 60 years and above
PL2	Poland	Little Brothers of the Poor (nationwide organisation)	Voluntary workers aim to improve the quality of life and break the isolation of older people. The main activities are home visits, holiday trips and meetings.	23.3% of the volunteers are older people
PL3	Poland	Parish Rosary Circle (nationwide groups)	Circle members visit older people at home and spend time with the dying. In addition, they take care of the church and the cemetery and participate actively in masses.	75% are older people
UK1	United Kingdom	Seniors Show the Way (City of Bradford)	After attending training, older people become 'community health champions'. They are encouraged to impart their newly gained knowledge of health promotion to friends and neighbours. Beyond that, 'super champions' take up regular tasks.	28% of the 'champions' are aged between 55 and 64 years, 26% are between 65 and 74 and 29% are aged 75+
UK2	United Kingdom	Active Volunteering by Disabled People (London Borough of Barnet)	Volunteers' tasks vary depending on their skills. For instance, they participate in oral history projects in churches and schools, help college students with special needs, befriend older people and contribute to fundraising.	The majority of volunteers are between 40 and 60 years old, a few older than 60
UK3	United Kingdom	Weardale Prescription Delivery and General Practitioner Car Scheme (County of Durham)	Older volunteer drivers support the independent living of older people in their own homes. They provide a transport service to enable access to doctors' surgeries and other medical facilities and provide a free home delivery of repeat prescriptions.	Most volunteers are older than 50 years

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*Europe is undergoing a previously unwitnessed ageing of the population. In view of this, social inclusion of the elderly and strategies to promote voluntary work among older people are now important items on the EU's political agenda.*

*This report is based on 30 case studies from 11 Member States in which volunteers, not always exclusively older people, were successfully engaged in meaningful projects of all kinds. The cases demonstrate best practice in all aspects of the issue, ranging from strategies to recruit volunteers to ways of keeping them engaged and utilising their talents to the full. The report has a special focus on volunteering by those who may themselves be at risk of social exclusion.*

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