Engaging Retired Leaders as Volunteer Leaders

A Research Report

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For: Volunteer Victoria

Canada

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Engaging Retired Leaders as Volunteer Leaders

1. Introduction

Retired leaders have the potential to make valuable contributions to nonprofit and charitable organizations in roles such as serving on advisory boards, leading strategic planning, and acting as mentors. As the baby boomers retire, organizations can benefit from the substantial skills and expertise that these leaders have accumulated throughout their careers. Engaging retired leaders in volunteer activities can contribute greatly to the success and long-term sustainability of a nonprofit or voluntary organization.

In order to successfully recruit and engage this highly skilled group, organizations need to better understand their needs, motivations, and plans for retirement. What are their post-retirement goals and where does volunteering fit into their plans? What are the opportunities and the potential barriers? What steps can voluntary sector organizations take to involve these leaders?

Volunteer Victoria undertook this research project in 2004. The research objectives were:

1. to create a profile of near retirement and recently retired community leaders in the Greater Victoria area; and,

2. to gain insight into their needs as volunteers so that nonprofit and charitable organizations can more effectively engage them.

We define a leader as an individual with substantial experience in managing or leading all or a significant part of an organization in the business, public, or nonprofit sector.

The study was carried out in two parts. The research team conducted an initial literature review of current studies on near retirement and just retired leaders as potential volunteers. Then, the team conducted a field study to compare and contrast the findings in the literature with that from the field. Focus groups and interviews were undertaken with a representative sample of leaders from Greater Victoria. A questionnaire survey based on the literature review and input from these focus groups, gathered information about the needs, retirement goals, and interest in volunteering of a group of 71 leaders.

The findings of this study guided the development of a resource manual that includes strategies for promoting volunteering to retired leaders, recruiting them as volunteers, and placing them in positions that will be fulfilling to the retired leaders and beneficial to the organization.

2. Literature Review

This literature review explores issues concerning volunteering among seniors, executives, and other organizational leaders. The review focuses on education, income and occupation; the motivations for and benefits of volunteering; and recruitment strategies used by nonprofit and charitable organizations. It includes studies conducted in Canada and other countries.

Facts about volunteering among seniors in British Columbia

Questionnaire surveys are an important tool used in studies on volunteering. In Canada, the National Survey of Giving, Volunteering and Participating (NSGVP), conducted by Statistics Canada in 1997 and again in 2000, provides a rich source of information for researchers and practitioners.

In a summary of these surveys, Saunders (2000) reported that over one in four residents of British Columbia (B.C.) volunteered at a nonprofit and charitable organization in 2000. According to Reed and Selbee (2000), British Columbians volunteered more hours on average per year than did other Canadians. Within B.C., residents from the Victoria area were more likely to volunteer (40%) than were those in other areas, but contributed fewer hours each than did B.C. residents as a whole.

Age is a factor in volunteering: British Columbians aged 65 and older were less likely to volunteer (12%) than were those aged 45 to 64 (28%). However, according to Saunders (2000), seniors who did volunteer contributed more hours on average (233 hours) than did those aged 45 to 64 (172 hours).

Motivations, needs, and obstacles

According to Hall, McKeown, and Roberts (2001), the decision to volunteer is influenced by a variety of factors. Canadians report that they are motivated by religious obligation, feelings of personal connection, the opportunity for personal or professional development, and a desire to maintain social connections. Canadians begin volunteering when they are asked directly, by approaching an organization on their own, or through family connections (i.e., they have family members who are already involved with the organization).

Chappell (1999) found that seniors volunteer to fulfill certain needs – the foremost of these being the need for leisure pursuits to fill free time with interesting activities. Among other reasons seniors give for volunteering are: to make good use of their skills and abilities, to feel useful, and to fulfill a need for affiliation, participation, social status, altruism, or social reform. On the other hand, Chambre (1987) suggests that retirement does not lead to a change in people's sense of free time and argues that volunteering is a leisure activity like any other rather than an activity to fill free time.

According to Graff (1998), volunteering opportunities for seniors fulfil their needs to use their skills and life experiences, foster social connections, and allow time to adapt to a change of environment. Volunteer Canada and the Canadian Centre for Philanthropy (2000) maintain that the over-50 age group volunteer to support causes *dear to their hearts* and to put their skills and experience to good use.

According to Fischer and Schaffer (1993), older volunteers in the United States, like their younger counterparts, are motivated by the significance and effectiveness of their work. Older volunteers are more likely to volunteer in order to enhance their status, to make use of free time, or because of religious beliefs. They are less likely to be motivated by material rewards.

Chappell and Prince (1997) compared 15 reasons for volunteering given by middle-aged Canadians (aged 45 to 64) and senior Canadians (65 and older). They found that seniors were less likely than their younger counterparts to volunteer out of self-interest and more likely to volunteer out of moral obligation and to support socially worthwhile causes.

Caro and Bass (1997) note that receptivity to volunteering and willingness to volunteer are greater in older people who are about to leave or have recently left their jobs. This implies a higher motivation to volunteer among individuals near retirement or recent retirees.

In addition to examining what needs volunteering fulfils and what motivates seniors to volunteer, a number of studies have looked at barriers and reasons for not volunteering.

For example, a study cited in Maunsell (1998) identified the following as obstacles to volunteering: lack of information about volunteering: costs associated with volunteering (e.g., fuel, parking); complex regulations; volunteer turnover; fear of violence; confusion about volunteer roles; a tendency to get too emotionally involved; and intrusion into personal life.

Fischer and Schaffer (1993) cited poor health and lack of transportation as reasons why the elderly do not volunteer. Caro and Bass (1997) reported that poor health is a barrier for retirees and so are competing obligations for seniors who are employed. The Canadian Centre for Philanthropy (2003) found that the main reasons that Canadian seniors did not volunteer more were not enough time, health problems, donating money in lieu of time, and having volunteered in the past.

Heartbeat Trends (2001) lists examples of personal, contextual, systemic, and organizational barriers that constrain older baby boomers to volunteer. Personal barriers include lack of time, continuing work or care-giving responsibilities, and poor health. Apathy by those who had not previously volunteered, and the positioning of volunteering as a civic responsibility rather than an opportunity for personal fulfillment, are examples of contextual barriers to volunteering. A major systemic barrier identified by Heartbeat Trends is the lack of information about volunteer opportunities, while organizational barriers include lack of recognition, feelings of not making a difference, internal politics, lack of flexibility, too much red tape, and the financial cost of volunteering.

Volunteering and socioeconomic status

Many studies have explored the relationship between volunteering and socioeconomic status (i.e., an individual's income, education, and employment). The findings from these studies are particularly relevant to our research because retired leaders are likely to be better educated and have higher incomes than other individuals who are approaching retirement.

Chambre (1987) found a positive relationship between socioeconomic status and various types of formal social participation in the United States. The author concluded that people with a higher socioeconomic status are interested in volunteer opportunities that offer rewards and prestige such as board membership. According to Fischer and Schaffer (1993), social class is the most significant demographic factor associated with volunteering in the U.S. Professional people with higher incomes and more formal education are more likely to volunteer. They also concluded that volunteering decreases with age because older people have lower incomes and less formal education than their younger counterparts. Heartbeat Trends (2001) noted a positive relationship between income and volunteering.

Employee volunteerism and volunteering by senior executives

Research has shown that the volunteering rate among senior executives is high while they are still working. However, it seems that retired leaders are slightly less represented among retired volunteers. Most studies have found that leaders are similar to other groups of seniors. They want to give back to the community by helping others and by making a difference through meaningful volunteer experiences.

Using survey data from business people in the United Kingdom, Walker (2002) found that two thirds of senior executives volunteered for organizations. Over half were actively involved in three or more voluntary organizations and served an average of seven years. About one quarter of business people felt that they were expected to volunteer. More importantly, altruism was found to be a significant motivating factor for this group.

According to Fisher (1999), it seems to be the norm for senior company executives in the U.S. to be actively involved in volunteering. Almost all Fortune 500 CEOs sat on boards of nonprofit organizations and most encouraged their executives to serve as nonprofit board members. The main reasons these CEOs gave for volunteering were personal satisfaction and to give back to society.

Ekos Research Associates (2003) conducted two surveys in 2002 to understand how people and particularly those in leadership positions view the nonprofit and voluntary sector in Canada. Their leadership survey included executives, deputy ministers, CEOs, directors, and elected mayors. This group viewed the nonprofit and voluntary sector as one of the three pillars of society with the private and public sectors. They were more convinced than the general public that this sector has a vital role to play in political decisions and public policies. This may explain the high rate of volunteering among these leaders who identified the top priorities for the sector as building stronger communities and delivering effective services.

Luffman (2003) examined the contribution of employers in supporting employee volunteering in Canada using the results of the 2000 National Survey of Giving Volunteering and Participating. Results suggest that because managers (ranging from retail sales to senior executives) have more authority and control, they also have better access to certain forms of employer support for volunteering. A large percentage of managers reported having had approval to use facilities, take time off work, or change their work hours to accommodate volunteering activities.

Senior volunteering and benefits

Chappell (1999) suggests that seniors who volunteer gain health benefits from the activity, although it is unclear if those who are in good health to begin with are the ones who tend to volunteer. In a similar way, Graff (1998) suggests that volunteering encourages self-confidence, improves nervous system performance, decreases blood pressure, and increases mental alertness. Yet, according to Fischer and Schaffer (1993), the research literature on the benefits of volunteering is inconclusive. These authors found research on the health, psychological, and social benefits of volunteering to be mixed and concluded that good health is a precondition for volunteering.

The literature also suggests that executives benefit from volunteering. Fisher (1999) reported that the main benefits CEOs derived from volunteering on a board of directors were a sense of personal satisfaction and feeling good about helping others. Results also showed that almost nine out of ten CEOs believed that volunteering helped executives learn how to work with different people, build business relationships, network, and develop skills. Similarly, Walker (2002) reported that the involvement of executives on a nonprofit board was beneficial to the firm's bottom line. According to Luffman (2003), one of the main benefits of volunteering is the variety of skills that volunteers can gain, which can be applied to their paid employment and which may increase their productivity.

Strategies to attract volunteers

The best way to recruit volunteers is through word-of-mouth. Thus, it is not surprising that most Canadians begin volunteering because someone within a nonprofit and charitable organization asked them (Hall et al, 2001).

Volunteer Canada and the Canadian Centre for Philanthropy (2000) outlined strategies to recruit older adults as volunteers. They suggest that organizations should create short-term volunteering opportunities with specific outcomes, because older adults want to make a meaningful contribution in a shorter period of time. Organizations should also produce promotional material that identifies volunteering as an opportunity to make a meaningful contribution. A further key strategy is to use a personal approach to recruit baby boomers. Finally, nonprofit and charitable organizations should partner with businesses to develop projects or establish relationships that encourage employees to volunteer.

According to Chambre (1987), organizations recruit volunteers by appealing to both altruism and self-interest. Media publicity is necessary to attract potential volunteers and make them aware of volunteer opportunities. An effective next step to recruit volunteers is direct solicitation by nonprofit organizations. Consistent with other studies, Barnes (2000) suggested that the most effective recruitment strategy is direct contact with people. Orientation tours and postings also allow volunteers to learn more about nonprofit and charitable organizations.

Smith (2004) found that it is important for people to maintain established patterns of behaviour throughout their lives. Consequently, a better strategy for

nonprofit organizations that hope to attract seniors is to expand volunteer recruitment efforts to older people generally. Nonprofit organizations should target both pre-retirement people and those who are retired, instead of just focusing on the latter. Also, organizations should offer workshops on retirement planning that increase the visibility and appeal of volunteering.

Relevance of the findings from the literature to this study

The studies that we reviewed offer a range of ideas and findings that had potential relevance to our research. For example, the work on motivations for volunteering, socioeconomic factors, facts about seniors' volunteering, and strategies to attract volunteers was useful for understanding and developing recruitment materials for retired, older adults, and seniors.

However, while the findings from the literature review were informative and have a degree of obvious relevance, they may not have been directly applicable to the target group of leaders in our study. These other studies were developed in different contexts and were either too broad, (i.e., covering all volunteers) or were on specific target groups (e.g., seniors) but not necessarily those who had leadership roles when working. However, we wanted to compare their findings with ours from our study of the leaders. We thought it would be of value to see how much of their findings have relevance for recruiting retired leaders.

We also used the findings from the studies we reviewed to develop our field instruments for the focus group sessions and the questionnaire survey of leaders.

3. Field Research Methodology

In the field study, we collected data from a sample of leaders in Greater Victoria, B.C. who mainly comprised individuals relatively close to retirement and just retired. We collected data between May and July 2004 through focus groups and a questionnaire survey. Seventy-one leaders completed this survey including focus group participants. The following section describes how we chose participants and collected the data.

Sample

We approached 170 employers in the Greater Victoria area to nominate executive and senior manager leaders who were within 5 years of retirement. Seventy-one leaders were nominated from 50 different workplaces, which included government, the private sector, and higher educational institutions.

We got our sample of employers from the database of WCG International (WCGI) in Victoria, B.C.[1] As the WCGI employer database was not comprehensive with respect to size of employer (medium and small organizations were underrepresented), we relied on their own knowledge of local employers to bolster the sample of employers in the small to medium size range.

We sent a letter to private and public sector employers explaining the study and requesting the nomination of leaders or key decision makers within their organization who are within three to five years of retirement. As the response rate was low (40%

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1 D&B Canada Headquarters, 5770 Horntail Street, Mississauga, Ont. and WCG International, 915 Fort St., Victoria, B.C.

for large employers and less than 20% percent for medium and small employers after four follow-up attempts), 10 participants were recruited directly by the researchers to make up the proportions for our sample. The direct recruitment was based on personal contacts of the researchers, Volunteer Victoria and Leadership Victoria (a local network organization).

The primary reason for the low response rate, particularly from small and medium sized organizations, was that executives and managers were too busy to respond. In some organizations, there were also no leaders who were close to retirement, and in others the executives did not want to be identified as contemplating retirement. Nonetheless, the approach of asking employers to nominate potential retired leaders was the most practical, as there was no other obvious way to systematically identify and reach these individuals.

Table 1 shows employers within the Greater Victoria area from where we drew our sample of leaders for this study. As our focus was on recruitment of executive and senior manager leaders, we felt that large organizations would employ a proportionately greater number of these individuals. We asked all of the 20 large employers to nominate leaders for our study. We hoped to obtain 50% of our participants from these large employers. We approached 50% of medium sized organizations (100-500 employees) and 2% of small organizations (less than 100 employees) to nominate leaders. We hoped that each of these categories of organization would provide 25% each of our participants. In reality, the proportion of leaders for our study coming from large, medium and small organizations were 60%, 18% and 22% respectively (Table 1).

Table 1: Organizations from where leaders were selected

Size of Employers	Number of Employees	Approximate Number of Employers in This Size Category	Number of Employers Solicited	Proportion of Leaders Aimed for in the Research	Actual Proportion of Leaders Obtained for the Research
Large	Over 500	20	All 20 employers approached	50%	60%
Medium	100 - 500	100	50% of employers approached	25%	18%
Small	Under 100	5000	2% of employers approached	25%	22%

Participants' employers reflected a mix of large (top 20) and medium sized organizations (100 - 500 employees), including government (42%), businesses (39%), universities and colleges (11%), and nonprofits (4%) (Table 2). Smaller employers, primarily businesses, are under represented, as they employ fewer executives and senior managers. Also many were busy and too understaffed to participate. For participants who were already retired, the organization of last employment was included in these responses.

Participants completed the survey either in a focus group or personal interview. In total, 25 leaders participated in one of three focus groups; the remaining 46 had personal interviews, 23 face-to-face and 23 over the telephone.

Questionnaire survey

We designed the questionnaire to gain a profile of the 71 business, public sector, and nonprofit leaders in our sample. Our objective was to compile information that would be of interest to nonprofit and charitable organizations seeking to attract retired leaders as volunteers. Our survey was refined through feedback from the initial focus group meetings and from Volunteer Victoria.

In our survey, we asked for personal information about the participants, including age, gender, education, income, health status, and skill sets. We also asked about employer-supported volunteer programs. Finally, we explored participants' attitudes, motivations, and past experience related to volunteering, their plans for retirement, and the possibilities of their volunteering during their retirement.

Table 2: Employment sector leaders in the study

	Percentage Composition of Different Employers							
	Business Organizations		Government Including Crowns			University or College	Nonprofit	Other
	High	Medium	Federal	Provincial	Municipal			
Where participants in this study were or had been employed	13	26	3	32	7	11	4	4
Workforce distribution among all employers[2]	60		25			15		

2 Approximate estimates based on the WCGI database.

Our survey consisted of 24 close-ended questions, with many having space for comments. We summarized the comments together with focus group findings to produce recommendations for attracting retired leaders to volunteer activities.

Focus groups

We conducted three focus groups with eight to nine participants in each group, totaling 25 participants. The proportion of male participants (80%) in the focus groups was similar to that of the survey (i.e., 82%). Just over half of the participants were from large organizations and the remaining from small and medium sized ones.

A professional facilitator conducted the focus groups. After introductory remarks, the facilitator asked participants to complete the questionnaire survey then discuss the research process and questionnaire. This discussion provided more detailed information and important feedback for adjusting the questionnaire for the survey of the remaining 46 participants in our sample.

Interviews using the questionnaire

The remaining 46 out of the 71 participants who did not attend focus groups completed the questionnaire survey by personal interview. We interviewed 23 participants face-to-face and 23 over the telephone. Most of the face-to-face interviews were conducted in small groups of two or three. Compared to the one-to-one personal interviews, where two or three changes to the appointments were often required to complete an interview, the small group format was more successful in providing motivation for the busy executives to keep their interview appointment, initiate

discussion, and complete the survey. We processed the questionnaire responses using Survey Logix software developed by Sparklit Networks Inc.[3]

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3 Survey Logix software information last retrieved June 21, 2005 from Sparklit Networks website: www.surveylogix.com.

4. Findings

Questionnaire survey

### *Profile of leaders*

Gender

Most leaders were males (82%) aged 55 or older (67%). Low representation of women in our sample (13 out of 71) probably reflects their low numbers in senior positions of the organizations we approached. Statistics Canada (2001) showed that over two thirds of managers in Canada are male. Their numbers are even higher in more senior executive positions. According to the Feminist Majority Foundation, women currently make up only 3% of senior executives at Fortune 500 companies in North America.[4] Their representation in the public sector is better. Approximately one third of executives in the Canadian public service are now women.[5] However, the target group for this study probably reflects the reality of women constituting a small proportion of the executive leadership ranks.

Retirement status

Although we requested employers to nominate organizational leaders who were within 3 to 5 years of retirement, some nominated participants who were more than five years away from retirement and some who were already retired. Over half (62%) of the leaders expected to retire in five years or less, 21% expected to retire in more than five years, and 17% were already retired (Figure 1).

Figure 1: Leaders expected time to retirement
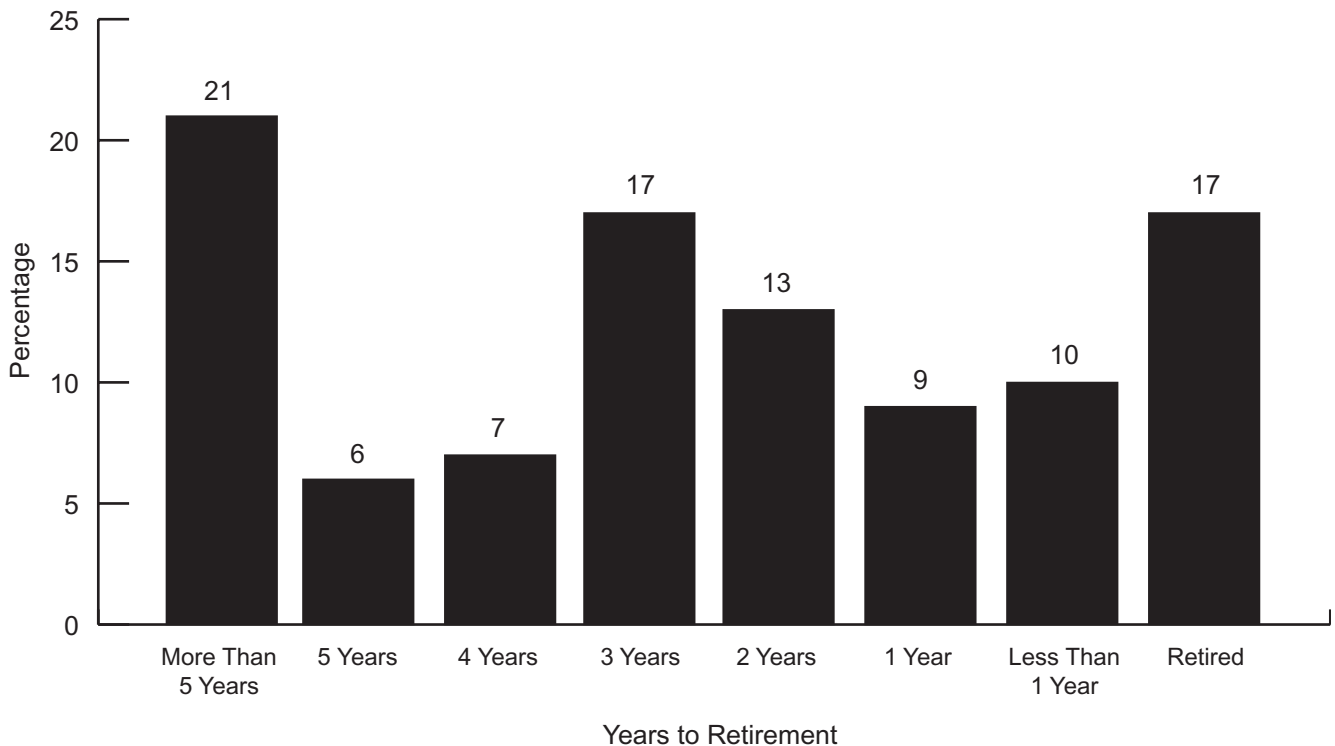
4 Feminist Research Centre. (n.d). *Empowering women in business: Myths about women in business*. USA: Feminist Majority Foundation. Last retrieved June 21, 2005 from Feminist Majority Foundation website: www.feminist.org/research/business/ewb_myths.html.

5 Canada Public Service Human Resource Agency. (n.d). *President's message*. Last retrieved June 21, 2005 from the Agency's website: www.hrma-agrh.gc.ca/reports-rapports/ee-04-1_e.asp.
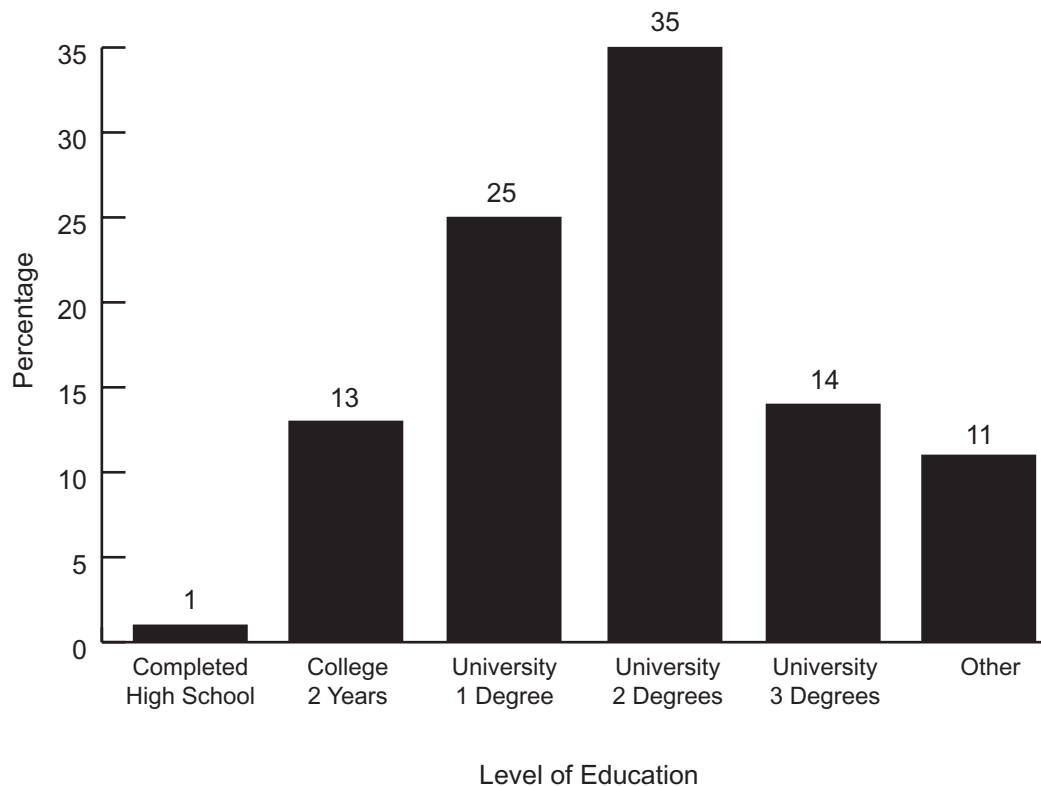
All participants were, or had been, in senior executive or leadership positions such as executive directors, directors, and deputies (24%); presidents and CEOs (16%); managers (16%); deputy ministers or assistant deputy ministers (9%); deans and principals (8%); consultants (5%); and owners/proprietors (22%).

In our study, only 26% of the leaders were earning or had earned less than $76,000 per annum, 64% were earning or had earned $76,000 to $150,000, and 9% more than $150,000. In contrast, the average income for all Canadians 45-54 years of age was $39,600, and for 55-64 years $33,000 according to the Statistics Canada (2003).[6]

Most leaders (99%) had a post-secondary education and 85% had at least one university degree (Figure 2). In comparison, of the Canadian population aged 45-64, only 34% had a post-secondary education and only 16% had a university degree according to the Statistics Canada (2003).[7]

Chambre (1987) and Fischer and Schaffer (1993) found a positive relationship between socioeconomic status (which includes income and education) and volunteering in the U.S. The education and income of leaders in our sample reflect this link between socioeconomic status and volunteering as 86% of them had been volunteers or were currently

Figure 2: Educational attainment of retired leaders

Level of Education

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volunteers. Having a higher income means people are less financially constrained and can afford to offer some of their time to volunteering. Certainly the leaders in our survey did have more than adequate incomes. Respondents ranked the adequacy of their income on a scale from 0 (not adequate) to 10 (very adequate). Seventy-five percent of participants (75%) rated the adequacy of their income as 7 and above.

Skills

The leaders had a wide range of planning, policy-making, and management skills that would be very valuable for designing and managing volunteer programs of nonprofit organizations (Table 3).

Table 3: Major skills areas of leaders

Skills	Percent
Strategic Planning	90
Mission, Vision, Values	83
Policy Development	82
Project Design and Management	79
Program Management	77
Monitoring and Evaluation	73
Personnel Management	72
Teaching / Mentoring	70
Financial Management	66
Other	34

Note: Respondents were allowed to choose as many items as applied to them.

Volunteer experience

Participants rated their understanding of the nonprofit and voluntary sector using the following guidelines:

- *Limited knowledge:* Knows about 1 to 2 volunteer services.
- *Moderate knowledge:* Has a general overview of range of volunteer services.
- *Good knowledge:* Knows about 5 or more volunteer services.
- *Excellent knowledge:* Has up to date knowledge of many of the volunteer services, opportunities, and initiatives.

Figure 3 shows that one third of leaders had a moderate understanding of the nonprofit and voluntary sector and 37% rated their knowledge as good to excellent. Only a quarter said their knowledge was limited. So overall, leaders in our study had a reasonable knowledge of the nonprofit and voluntary sector.

Figure 3: Respondents' understanding of the nonprofit and voluntary sector

No Answer 6%
Excellent 13%
Moderate 33%
Limited 24%
Good 24%
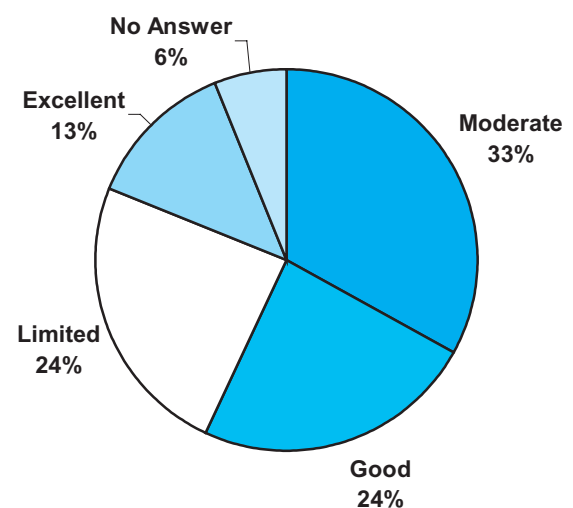
Their knowledge of the voluntary sector arises from being actively involved. Figure 4 shows the number of volunteer activities in which leaders are presently engaged. The majority of them (86%) were currently volunteering. They did a wide range of volunteer activities with provision of social services, and arts and culture to their communities being the most popular (Table 4).

Leaders also indicated the extent of their previous volunteer experience. Figure 5 shows how many volunteer activities they had been involved in. Almost all of the participants (90%) had volunteered at some time in the past. Over half (54%) had volunteered for 4 or more activities.

Figure 5: Past volunteer activities

Figure 4: Number of volunteer activities currently undertaken by respondents in this study
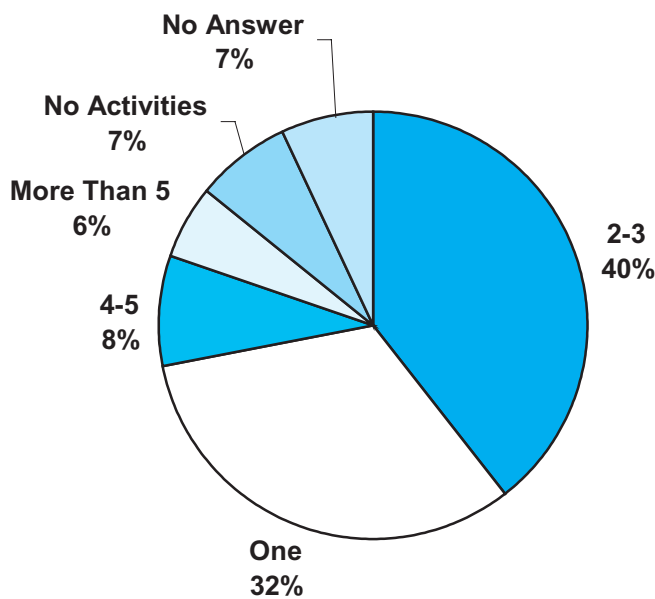
Table 4: Major skills areas of leaders

Types of Organizations	Percent
Social service organizations	55
Arts and culture	49
Politics	44
Sports	43
Service clubs	41
Health agencies	36
Religious / Spiritual	28
Other	26

Note: Respondents were allowed to choose as many items as applied to their activities; therefore the total is greater than 100%

Table 5: Motivations for volunteering

Reasons for Volunteering	Percent
Satisfaction in helping others	70
Support worthwhile social causes	58
Personal growth	56
Social relationships	52
Support personal and religious beliefs	27
Reinforce self worth	23
Way to spend leisure time	17
Other	17
Status / reward / recognition	15
Feel obligated	15
Material rewards	3

Note: Respondents choose as many items as applied to them; so the total is greater than 100%.

Leaders expressed various reasons for volunteering with 'satisfaction in helping others' as their main motivation (Table 5, pg. 13).

Retirement goals and plans

When participants were asked to indicate their general goals for retirement without being asked directly about volunteering, only 18% identified volunteering as a major retirement goal. However, almost nine out of ten participants (86%), including 80% of those already retired, indicated that volunteering was part of their retirement plans. These seemingly contradictory findings may be explained by the way the two questions were asked. The question about retirement goals was open-ended, *"Do you have retirement goals and if so what are they?"* Without being prompted, participants did not identify volunteering as a high priority retirement goal.

However, when asked specifically *"Is volunteering part of your plan to date?"* they responded very positively. Main retirement goals included travel, recreation, and household and family activities (Figure 6).

When asked about work plans for retirement, only 18% of participants indicated that they planned to stop working after retirement (Table 6). Others said that they planned to work fewer hours (32%), become self-employed (25%), change the kind of work they do (24%), never stop working (14%), or continue working in their present roles (10%).

While 12 of the 71 respondents (16%) identified themselves as retired (presumably from their primary employment), only 1 of these 12 individuals stated they had stopped working altogether; the rest were working in consulting or other paid employment (See Table 6, p. 15).

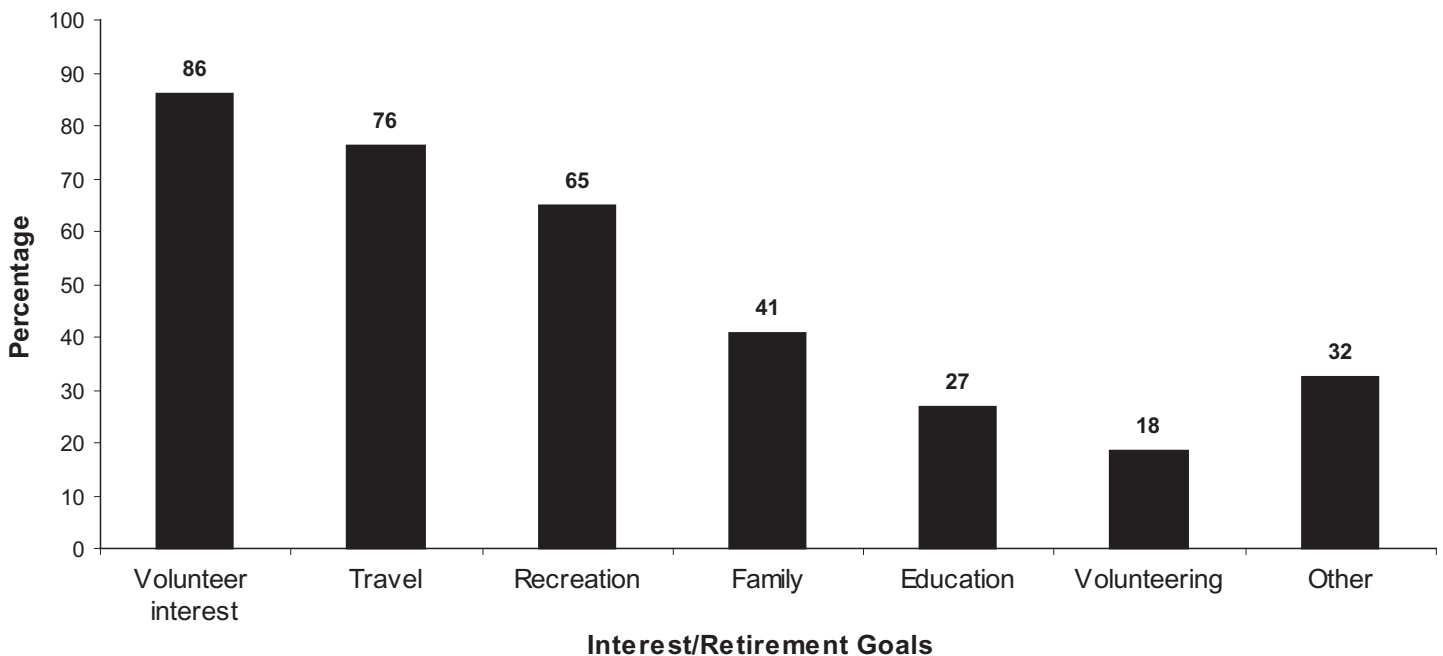**Figure 6: Retirement goal of leaders**

Table 6: Leaders' activity plans for after retirement

Activity After Retirement	Percentage	
	Of All 71 Respondants	Of Those Who Had Already Retired
Work fewer hours	32	17
Work for self	25	25
Change type of work	24	8
Stop working altogether	18	8
Never stop working	14	25
No current plans, continue as is	10	0
Not given it much thought	3	0
Other	15	17

Note: Respondents were allowed to choose as many items as applied to them, therefore the total is greater than 100%

When asked about interest in making volunteering part of their retirement plan, participants rated their interest on a ten-point scale ranging from 0 (low) to 10 (high). The overall rating for the 71 respondents was 6.7, indicating a relatively high interest in volunteering.

As there was this interest, we asked participants if they wanted to continue with their current volunteer activities or pursue new volunteer opportunities in their retirement. Over one third of participants indicated that they would prefer to find new volunteer opportunities, while 20% said they wanted to continue with their current activities. Another third planned to pursue new activities in addition to continuing with their current commitments.

We also asked about the participants' potential to volunteer beyond their current level of commitment. Sixty-four (64%) participants indicated a medium to high interest in taking on additional volunteer commitments (Figure 7).

Figure 7: Leaders' potential to volunteer beyond current commitments
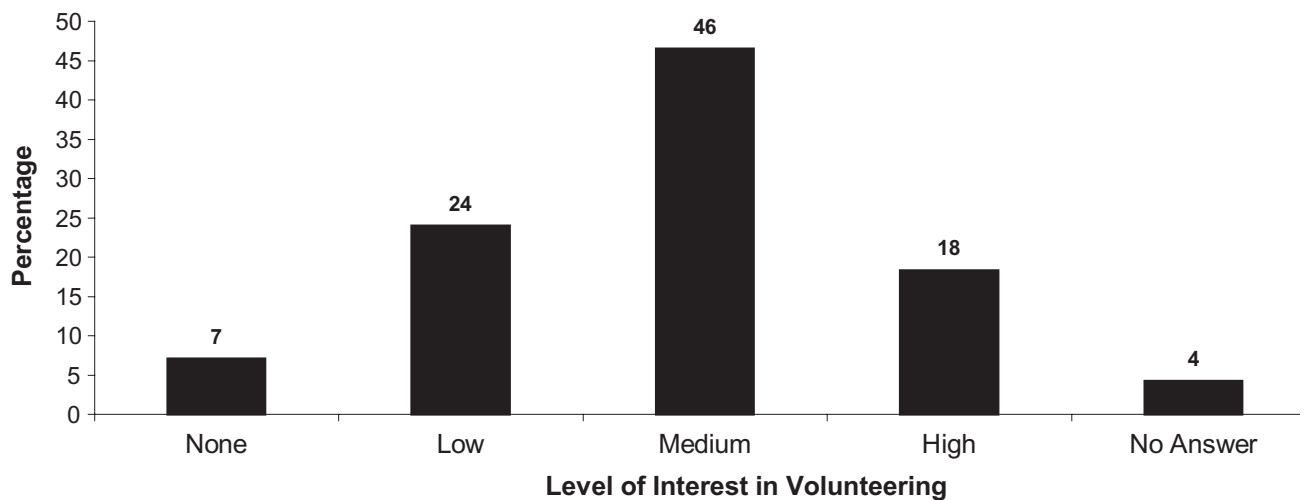
If they did volunteer in the future, participants indicated that their top choices of volunteer activities would be those associated with education and training, social services, arts and culture, service clubs, and environment (Table 7).

Table 7: Types of volunteer activities leaders would pursue when retired

Volunteer Activity	Percentage
Education and training	56
Social services	45
Arts and culture	42
Service clubs	34
Environment	34
Sports	31
Health agencies	28
Politics	27
Religious / Spiritual activities	17
Other	8

Their reasons for pursuing such volunteer activities in the future would be to fulfil a number of needs and interests on retiring. These included learning, helping others, forging new relationships, engaging in meaningful work, and teaching and mentoring (Table 8). These findings confirm those of Fischer and Schaffer (1993) and Chappell and Prince (1997) in their studies on seniors.

Table 8: Leaders needs and interests in volunteering

Needs and Interests	Percentage
Learning	73
Altruistic needs	65
New relationships	63
Meaningful work	62
Teaching	51
Appreciation	38
Other	7

Note: Respondents were allowed to choose as many items as applied to them, therefore the total is greater than 100%

Participants felt that their needs would best be met if they engaged in volunteer efforts on short-term projects that were well defined and had tangible outcomes. On such projects, they would mostly like to share their knowledge and experience in a coaching or mentoring capacity so they could aid the nonprofit organization in terms of their governance and personnel and financial management (Table 9).

Table 9: Volunteer activities where leaders want to share their skills

Volunteer Activity	Percentage
Special projects (short term)	65
Coaching, mentoring	59
Management	56
Governance	49
Financial / Personnel / Project consultation	41
Environment	20
Fundraising	11
Individual care	7
Other	6

Barriers to volunteering

Half of the leaders identified lack of time as the greatest barrier to volunteering, a finding that is consistent with previous research (e.g., Canadian Centre for Philanthropy, 2003).

They also identified other barriers such as lack of meaningful or challenging work, the restrictions that volunteer commitments place on freedom to travel, lack of information, and confusion about volunteer roles. These findings support those of Fischer and Schaffer (1993) and Caro and Bass (1997) (Table 10). These findings also suggest volunteer roles need to be flexible in timing of activities and length of commitment but also meaningful in content and purpose so volunteers feel they are achieving something.

Table 10: Perceived constraints and barriers to volunteering

Constraints or Barriers	Percentage
Time commitment	51
Work not meaningful	38
Restricts travel	38
Not challenging	27
Intrusion into one's life	24
Lack of information	23
Confusion about role	15
Complex regulations	11
Emotional commitment	10
Personal health	8
Cost of volunteering	7
Other	15

Attracting leaders to volunteering on retirement

The leaders were very clear about what would make volunteering on retirement more attractive. They said that nonprofit organizations should initially do outreach among employers in the public and private sectors in order to stimulate greater awareness of, and commitment to, volunteering among those sectors' leaders. They emphasized the need is for focused promotion, marketing, and direct contact with employers and their senior staff by nonprofit organizations.

Two thirds of the leaders in our study said that their level of interest would increase if they were provided more information about volunteer opportunities. They would also be willing to volunteer if they were simply asked.

However, stimulating awareness among leaders and asking them to volunteer is not sufficient to ensure they will necessarily commit to volunteering upon their retirement. According to the leaders in our study, the volunteer program and its associated activities need to have particular characteristics that:

- ensure volunteer's interests and skills are matched to the organization's needs;
- provide clear roles and responsibilities for volunteer positions;
- provide volunteer positions that are meaningful and innovative;
- provide short-term, well-defined assignments with tangible outcomes;
- offer flexibility in assignments;
- offer flexibility in time of activity and length of commitment;

- offer opportunities for retired leaders to volunteer with their peers;
- offer a well-structured and managed volunteer environment; and
- provide support and recognition for volunteers.

Nearly half of the participants (47%) indicated they would consider helping with a project to attract retiring leaders to volunteer their talents to the community. Another 30% reported they would be willing to recruit other leaders to participate in this study, and 34% said they would be interested in providing follow-up information.

5. Focus Groups Results

The focus group results were identical to the questionnaire survey with regard to attitudes toward volunteering and what would make volunteering attractive as a retirement activity. However some issues arose concerning the characteristics of volunteer positions, which were not highlighted in the questionnaire survey.

In the focus groups, leaders emphasized that volunteer roles should:

- offer them a new challenge outside of their present skill set;
- allow them to provide a direct service to the organization instead of *"running the show";*
- involve physical rather than intellectual challenge;
- not involve human resources issues, supervision, management responsibility, or decision making;
- allow them to help others run the organization through mentoring and coaching; and
- allow them to provide leadership without the stress and long hours of high-level positions.

All of the leaders commented that they did not want the position of being senior staff or board members if the commitment and stress was too large. They would rather assist in a mentoring capacity to share their knowledge and skills of leadership with senior staff and volunteers of the nonprofit organization. However, they did want to be challenged in volunteer roles so that they could expand their knowledge and experience, particularly in practical, physical activities.

Most participants in the focus groups agreed that the sessions were valuable, enjoyable, and provided them with focus. They also felt that they needed to

give more thought to their retirement because few had made specific plans. The sessions validated many issues for the participants, including the fact that leaders who are near to retirement or recently retired do not want their volunteer experiences to be marked by the pressures they experience in their working lives.

The focus group participants also offered suggestions for future initiatives and research:

1. Re-convene the group in one year to determine if participants have made progress with their retirement plans.
2. Invite Volunteer Victoria to introduce a volunteer matching service for retired leaders, to assist the participants to achieve a good fit.
3. Assemble a team of retired leaders with a mix of skills that can perform short-term projects for voluntary sector agencies.
4. Encourage Volunteer Victoria to draw from the wealth of leadership talent participating in these focus groups.

6. Conclusion

The purpose of our study was to create a profile of leaders in the public and private sectors, and gain greater insight into their volunteer potential. We sought to understand their needs so that nonprofit organizations can successfully engage them in volunteering.

It is important to note that our participants were not selected completely at random, as we had initially wished. Due to a low response rate from employers, particularly small businesses, we chose 10 participants purposively. Nonetheless, we ensured that our final group of participants was representative of large, medium, and small organizations providing employment in the Greater Victoria Area.

The sample of leaders nominated by their employers to participate in the study was also slightly biased because the participants may have been chosen for their interest in volunteering. Most (86%) said they were involved in at least one volunteer activity. The volunteer participation rate for British Columbians aged 45 and older typically ranges from 15% to 29% (Hall, McKeown, & Roberts, 2001). The findings in this study may reflect a higher rate of volunteerism because the participants were executives and organizational leaders or because of the bias in nomination. This is something that would need further study to clarify the situation.

The proportion of women leaders in this study was relatively small; only 18% of the participants were female. We suspect it is probably a reflection of the generally low numbers of women in senior executive and managerial positions in the private and public

sectors and requires further study to verify our assumption.

Despite these limitations, our findings do provide some valuable insights into leaders as potential volunteers. Data from the focus groups and questionnaire survey yielded a comprehensive profile of these leaders, including information about their skills, current volunteer involvement, retirement plans, and future volunteer interests. The study was also helpful in confirming some of the research findings from other studies mentioned earlier.

The volunteer rate was high among the participants in our study with close to nine out of ten leaders currently volunteering in some capacity. If our sample is typical of leaders in general in the Greater Victoria Area, there is large pool of potential volunteers that needs to be tapped by nonprofit organizations.

However, to ensure commitment from these volunteers, nonprofit organizations should promote the value of volunteering as a retirement activity to leaders who are still actively employed. Many of the leaders indicated that they had a wide variety of goals for their retirement and that volunteering was not a major one, only 18% indicated they are definitely considering it. But general interest in volunteering was high, 86% indicated that they were interested in considering the possibility of volunteering. The challenge is to turn that possibility into a definite commitment to volunteer after retirement. This should not be an insurmountable problem regarding the leaders in our study as over 80% of them are already volunteering in some capacity. However, as we pointed out earlier, our sample may not be truly representative of all leaders and so nonprofit organizations should not be complacent.

As the leaders pointed out, it is not sufficient for nonprofit organizations to just actively market volunteerism among leaders when they are still working, they must be marketing volunteer roles that are attractive and catch their interest. As leaders are talented, educated, and experienced people, they are looking for volunteer roles that will be both challenging and enjoyable. They should be challenging in terms of allowing the leaders to build experience and skills in new areas but also enjoyable in allowing them to forge new relationships while not burdening them with too much stress.

Leaders emphasized that they do not want to take on similar leadership roles and responsibilities that they held when they were employed. They would prefer to share their knowledge of leadership, governance, and management with senior staff and volunteers of nonprofit organizations in order to help train them in handling those positions more effectively. This goal of offering services in education and training was expressed by 59% of leaders.

What are the implications for nonprofit organizations if they want to take advantage of the potential volunteer resources that retired leaders represent? They need to design marketing strategies that are focused at leaders, which emphasize the value of volunteering as a retirement activity. Such marketing should start early; well before people are due to retire so that a culture of volunteering is built up among leaders and it becomes incorporated into their retirement plans.

Volunteer roles need to be flexible, innovative, and build skills for leaders so that they are able to provide services to their community and enrich their own lives by doing so.

Our study has highlighted the volunteer experience and retirement plans of leaders and hopefully provided insight into their capacity for, and scope of interest in, volunteering after retirement. These leaders have tremendous potential to contribute valuable skills and expertise to nonprofit and charitable organizations. They also have a wide array of options available to them on retirement. While there are many opportunities for organizations to engage these individuals in volunteering, there are also many other interests competing for retired leaders' time and attention. It will be up to nonprofit and charitable organizations to implement strategies that the leaders have identified in this study in order to make volunteering their activity of choice.

The findings of this study guided the development of a resource manual that includes strategies for promoting volunteering to retired leaders; recruiting them as volunteers; and placing them in positions that will be fulfilling not only to the retired leaders, but also beneficial to the nonprofit and charitable organizations.

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Notes

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