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Sensemaking and the management of older volunteers

Megan Paull

Edith Cowan University

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THESIS

Sensemaking and the Management of Older Volunteers

By MEGAN PAULL
B.A., Grad Dip Bus (HRM), M. Bus (HRM)

Thesis prepared in fulfilment of the requirements of the award of
Doctor of Philosophy (Business Studies)
at the
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School of Management
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2007

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Dr Allen Clabaugh
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This copy of the thesis does not contain the sealed section referred to in the statement of confidential information. These pages have been embargoed until sufficient time has passed to prevent the individuals mentioned from experiencing discomfort or distress should they recognise themselves in those pages. (Section 5.8.3).
For Greg

for Emily, Natalie and Damien

and for Mum and Dad

With love always.
DECLARATION

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In each of the six case study organisations I undertook to respect confidentiality and with all the interview participants to afford them anonymity. The statement of informed consent is included in Appendix E. In keeping with this undertaking I have included a sealed section in this thesis. The section will be removed from publicly available copies of the thesis to avoid embarrassment or regret being experienced by the individuals concerned should they believe that they have recognised themselves.

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ACKNOWLEDGEMENTS

The assistance of Volunteering Western Australia and the Positive Ageing Foundation and the unnamed agencies and individuals who participated in this study is appreciated. Without your help there would be no thesis.

Thanks also to Dr Allen Clabaugh and Dr Patricia Morrigan for their help as supervisors, and to Associate Professor Peter Standen and Professor Alan Brown from whom I sought support and assistance at times during the process.

I must acknowledge the support and forbearance of my family and friends who accompanied me on this journey, many of whom no longer dare to ask about the thesis. My thanks cannot be expressed in words. There are many of you who have provided counsel, practical assistance and support over the period in which I have been working on this project, and with whom I now look forward to a continued friendship.

Two people in particular have shared this journey with me in a way which cannot be repaid – my mother, Sallie Davies and my friend, Patricia Morrigan – without you I could not have made it. And to my colleague Dr Maryam Omari - we did it!

EDITING ADVICE:
My thanks also to Jan Knight of Flying Edits for her timely and diligent editing of the draft of this thesis in accordance with the Australian Standards for Editing Practice. Advice on language and illustrations (Standard D) and on completeness and consistency (Standard E) were provided. Any errors which remain are the responsibility of the author.

Megan Paull
June 2007
This study explores the experiences of older volunteers and their managers in particular when a change in the performance of the volunteer is noticed by the manager. The impetus for this study was an expressed concern of the managers of volunteers which classified the management of "older volunteers" as being somehow different from their younger counterparts. Conducted within an interpretivist framework this study employed a two-phase methodology comprising a context setting descriptive quantitative study followed by an in-depth qualitative grounded theory approach. The importance of the in-depth examination revealed the importance of context to the management process.

This study confirms that chronological age is less than useful as an indicator of frailty, dependency and decline. Further, it reveals that the social construction of age contributes to the manner in which managers approach older volunteers. Similarly, cognitive ageing and dementia are revealed as sensitive areas where lack of knowledge and understanding, taboos and denials, and anxiety contribute to inadequate communication.

Sensemaking emerged as a diagnostic tool which revealed the tensions and conflicts experienced by managers when they notice and bracket an interruption in the form of a variation in performance of an "older" volunteer. When the interruption is noticed increased sensemaking is triggered, and the manager seeks to understand "what's going on here?" by categorising and evaluating the nature of the performance variation in the "older" volunteer. What the manager evaluates to be the cause of the performance "decline" leads to decisions about the "what action is needed?" component of sensemaking.

Volunteers often self manage when they become aware of performance decline. When management action originates from the manager, three types of action are evident — a task oriented approach which can leave the volunteer feeling undervalued and ignored, a person oriented approach which can leave the volunteer feeling patronised and belittled, and a partnership where the manager and volunteer engage in a dialogue and joint action.

Factors which contribute to the manager's action include the knowledge, skills, experience and organisational support available to the manager. Most managers also report experiencing an emotional reaction to the realisation that the volunteer may be declining in functionality. Two additional factors emerged from the data which have implications for managing older volunteers. The first of these is the propensity for managers and other volunteers to classify behavioural changes in performance as being symptomatic of ageing, when in fact they may not be. The second is the "undiscussability" of cognitive decline which compounds the classification of behavioural changes as signs of cognitive decline, rather than managing them the same way as similar events would be managed with other volunteers. These two factors combine to allow behavioural changes which are cognitive decline symptoms to continue until they are undeniable, and behavioural changes which are not associated with cognitive decline to go unaddressed.
The evidence of a programme in one of the case study organisations indicates that increased communication and a mechanism for talking to volunteers about their performance provide a framework for managing performance variations. The literature indicates that early recognition of cognitive decline is of benefit to the individual because the earlier they are aware of it, the more they can do to slow the decline. Thus removing the taboo, the "undiscussability", of dementia, cognitive decline and other changes will be of benefit to the volunteer as well as to the manager.

This study is significant for several reasons.

- It is an in-depth exploration of the experiences of older volunteers from the perspectives of both managers and volunteers.
- It explores the manager's perception of "declining" performance and explains how manager sensemaking contributes to this perception.
- It offers a direction for research into the management of the performance of older workers in the paid workforce.

The potential implications of this research for the ageing paid workforce are clear. Managers of volunteers have been managing performance decline associated with ageing for a long time. Their experience suggests that there are practical steps which can be taken to help managers to better manage older people who are experiencing changes to their capabilities. The identification of some of these practical steps is timely. This research indicates that social construction contributes to the association of ageing with decline. This is likely to apply in the paid workforce as well. Ageing and decline may not always be synonymous, and recognition of this fact will help managers in their approach to older workers.

At this time with an ageing workforce this research has contributed valuable insights into the management of older workers. Social construction of age and the "undiscussability" of the ageing process lead to uncertainties and evasions on the part of managers who classify declining performance in an older worker as being age related. In the paid workforce with the abolition of compulsory retirement and with labour shortages leading to policies designed to keep older people in the workforce, research which investigates the management of older workers is both important and necessary. This thesis has taken one step in the conduct of such research.
ORGANISATION OF THE THESIS

Chapter One
Introduction
Managing older volunteers: A subject for study

Chapter Two
Literature Review - Older volunteers and volunteering

Chapter Three
Methodology
Research questions and approach

Chapter Four
Results Phase One
Establishing context

Chapter Five
Results Phase Two
Voices and viewpoints

Chapter Six
Findings
Synthesis and interpretation of results

Chapter Seven
Conclusion
Implications and the future
### TABLE OF CONTENTS

DECLARATION .......................................................................................................................... III

STATEMENT OF CONFIDENTIAL INFORMATION .................................................................. III

ACKNOWLEDGEMENTS .......................................................................................................... IV

ABSTRACT .............................................................................................................................. V

TABLE OF CONTENTS .......................................................................................................... VIII
  List of Tables ......................................................................................................................... xiv
  List of Figures ........................................................................................................................ xiv
  Acronyms ................................................................................................................................ xv

CHAPTER ONE  INTRODUCTION – MANAGING OLDER VOLUNTEERS: A SUBJECT FOR STUDY .................................................................................................................. 17
  1.1 SIGNIFICANCE AND CONTRIBUTION ................................................................. 17
  1.2 RESEARCH QUESTIONS .......................................................................................... 19
  1.3 BACKGROUND ......................................................................................................... 20
  1.4 IMPETUS FOR THE STUDY .................................................................................... 21
  1.5 SCOPE OF THE LITERATURE REVIEW .................................................................. 22
    1.5.1 A note on terminology ..................................................................................... 24
  1.6 METHODOLOGY, EPistemology AND RESEARCH APPROACH ............................... 24
  1.7 FINDINGS OF THE STUDY ...................................................................................... 27
  1.8 MEGAN’S STORY – PART 1 .................................................................................... 28
    1.8.1 In the research context .................................................................................... 28
    1.8.2 On a personal level .......................................................................................... 29
  1.9 SUMMARY ................................................................................................................... 29

CHAPTER TWO  LITERATURE REVIEW – OLDER VOLUNTEERS AND VOLUNTEERING .................................................................................................................. 32
  2.1 INTRODUCTION .......................................................................................................... 32
  2.2 VOLUNTEERING: A PRE-PARADIGMATIC DISCIPLINE .......................................... 32
    2.2.1 Geographic spread ......................................................................................... 32
    2.2.2 Nature of the research literature ........................................................................ 33
    2.2.3 The Australian scene ..................................................................................... 35
    2.2.4 A pre-paradigmatic discipline ......................................................................... 37
  2.3 CONTEXT ..................................................................................................................... 37
    2.3.1 Tensions and contradictions in the definition of volunteering ............................... 37
    2.3.2 Davis Smith’s framework ............................................................................... 40
    2.3.3 Seeking a typology .......................................................................................... 48
2.4 OLDER VOLUNTEERS .............................................................. 56
  2.4.1 Defining "older volunteers" in the literature ............... 56
  2.4.2 Measuring participation in volunteering by older Australians 58

2.5 OLDER WORKERS IN PAID EMPLOYMENT ...................................... 61
  2.5.1 Retirement age of paid workers .................................. 62

2.6 MANAGING VOLUNTEERS ............................................................. 62
  2.6.1 Managing paid and unpaid workers ......................... 63
  2.6.2 Motivation ................................................................. 64
  2.6.3 Managing volunteer performance ............................ 69

2.7 MANAGING OLDER VOLUNTEERS .............................................. 72
  2.7.1 The contribution of older volunteers .................... 72
  2.7.2 "Declining performance" in "older volunteers" .......... 73
  2.7.3 Performance of older workers ............................... 75
  2.7.4 Age discrimination in volunteering ...................... 76
  2.7.5 Myths and stereotypes ........................................... 77

2.8 MANAGING DIFFERENCE ......................................................... 79

2.9 SUMMARY AND CONCLUSIONS .................................................... 81

CHAPTER THREE  METHODOLOGY – RESEARCH QUESTIONS AND APPROACH ................................................. 86

3.1 INTRODUCTION ................................................................. 86
  3.1.1 Adoption of research methods ................................. 87

3.2 CREATING INTERPRETIVE RESEARCH QUESTIONS ......................... 90

3.3 DEFINITIONS AND TERMINOLOGY ............................................. 91

3.4 DESIGN OF THE RESEARCH: MAKING CHOICES ............................... 92
  3.4.1 Choosing Interpretivism: The study of meaningful social action 93
  3.4.2 Comparison with positivism ........................................ 95
  3.4.3 Incorporation of tools from other paradigms .............. 95

3.5 RESEARCH STRATEGIES: CONTEXTUAL SURVEYS ................................ 100
  3.5.1 Survey of managers of volunteers ........................... 101
  3.5.2 Survey of older people ......................................... 102
  3.5.3 Data analysis for Phase One .................................. 104

3.6 RESEARCH STRATEGIES – IN-DEPTH DATA COLLECTION .......................... 105
  3.6.1 Interviewing ............................................................ 105
  3.6.2 Data analysis for Phase Two ................................. 109

3.7 ON THE DEVELOPMENT OF GROUNDED THEORY ................................... 110
  3.7.1 Theoretical sampling ............................................. 112
  3.7.2 Constant comparison ............................................. 117
  3.7.3 Theory building .................................................... 120

3.8 SENSEMAKING AND THE SOCIAL CONSTRUCTION OF REALITY .................. 122

Megan Paull: Sensemaking and the management of older volunteers
3.9 SUMMARY ........................................................................................................................................ 128

CHAPTER 4  RESULTS PHASE ONE – ESTABLISHING CONTEXT.... 130

4.1 INTRODUCTION ............................................................................................................................ 130

4.2 SEEKING CONTEXTUAL DATA .................................................................................................... 130

4.3 SURVEY 1 – MANAGERS .............................................................................................................. 131
  4.3.1 Respondent profile .................................................................................................................... 131
  4.3.2 Responsibility for managing volunteers .................................................................................. 134
  4.3.3 Strategies and policies .............................................................................................................. 135
  4.3.4 Training .................................................................................................................................. 137
  4.3.5 Managers' views on older volunteers ....................................................................................... 137
  4.3.6 Declining performance ............................................................................................................ 138
  4.3.7 Advantages of involving older volunteers ............................................................................... 139
  4.3.8 Disadvantages of involving older volunteers .......................................................................... 141

4.4 SURVEY 2: OLDER PEOPLE'S PERSPECTIVES .......................................................................... 141
  4.4.1 Respondent profile .................................................................................................................... 142
  4.4.2 Former volunteers ....................................................................................................................... 143
  4.4.3 Active volunteers' experience .................................................................................................. 144
  4.4.4 Getting involved ....................................................................................................................... 147
  4.4.5 Current reasons for volunteering ............................................................................................. 148
  4.4.6 Satisfaction and feelings about volunteering ........................................................................... 149
  4.4.7 Particular areas of dissatisfaction ............................................................................................ 150
  4.4.8 Expectations for the future........................................................................................................ 150
  4.4.9 Volunteers' experiences of being managed .............................................................................. 152
  4.4.10 Volunteers' views on older volunteers .................................................................................... 153
  4.4.11 Comparison of perspectives .................................................................................................... 153

4.5 GENERAL FREE RESPONSE DATA – BOTH SURVEYS .................................................................. 155
  4.5.1 Organisational perspective ....................................................................................................... 155
  4.5.2 Older peoples' perspectives ...................................................................................................... 155
  4.5.3 Shared understandings and differing views ............................................................................. 156
  4.5.4 The context for further investigation....................................................................................... 157

4.6 SUMMARY AND CONCLUSIONS ................................................................................................... 158

CHAPTER FIVE  RESULTS PHASE TWO – VOICES AND VIEWPOINTS .... 
......................................................................................................................................................... 160

5.1 INTRODUCTION ............................................................................................................................ 160

5.2 WHAT IS MEANT BY “OLDER VOLUNTEERS”? ............................................................................ 161
  5.2.1 “Older than who?”: Volunteers on “older volunteers” ............................................................... 161
  5.2.2 “Older than me”: Managers on “older” volunteers ................................................................. 162

5.3 WHY VOLUNTEER? ...................................................................................................................... 164
  5.3.1 Keeping active and “young” ..................................................................................................... 164
  5.3.2 Satisfaction and hope ............................................................................................................... 166
  5.3.3 Passionate involvement ............................................................................................................ 167
  5.3.3 Life changing experiences ........................................................................................................ 168

5.4 THE OLDER VOLUNTEER-MANAGER RELATIONSHIP ............................................................... 169

5.5 MANAGER VIEWS ON MANAGING OLDER VOLUNTEERS ......................................................... 169

Megan Paull: Sensemaking and the management of older volunteers
## Chapter Six: Findings – Synthesis and Interpretation of Results

### 6.1 Introduction

### 6.2 What is “Older”?

### 6.3 Mapping the Data

6.3.2 Incipient state of sensemaking

### 6.4 “What’s Going On Here?”

6.4.1 Volunteer sensemaking

6.4.2 Others notice change

6.4.3 Manager sensemaking

---

Megan Paull: Sensemaking and the management of older volunteers
6.5 "WHAT ACTION IS NEEDED?" .................................................................245
   6.5.1 Volunteer sensemaking .................................................................245
   6.5.2 Manager sensemaking .................................................................246

6.6 VOLUNTEER AND PEER RESPONSES ..................................................248

6.7 THEORISING ABOUT MANAGER SENSEMAKING ....................................249
   6.7.1 The complexity of sensemaking .....................................................249
   6.7.2 Making sense .................................................................................252
   6.7.3 "What's going on here?" .................................................................253

6.8 WHAT DO I DO?--WHAT ACTION IS NEEDED? ....................................256
   6.8.1 Managers feel ill-equipped/trained ..................................................256

6.9 ACTION ..................................................................................................259
   6.9.1 Options for action ..........................................................................261

6.10 WHERE IS THIS LEADING? .................................................................263

6.11 SUMMARY AND CONCLUSIONS ........................................................266

CHAPTER SEVEN CONCLUSION: IMPLICATIONS AND THE FUTURE ..........268

7.1 INTRODUCTION .......................................................................................268

7.2 THE FINDINGS RELATING TO THE RESEARCH QUESTIONS .................268
   7.2.1 Experiences of management of older volunteers ...............................269
   7.2.2 "Performance decline" .....................................................................269
   7.2.3 Context ............................................................................................270

7.3 METHODOLOGY ....................................................................................271

7.4 IMPLICATIONS .......................................................................................272
   7.4.1 Implications for management of older paid workers ................................273
   7.4.2 Social construction and volunteering ...............................................274
   7.4.3 Understanding the social construction of age .....................................276

7.5 GENERALISABILITY OF THIS RESEARCH .............................................276

7.6 POTENTIAL FOR FUTURE RESEARCH ................................................277

7.7 LEGITIMATION .....................................................................................278

7.8 LIMITATIONS AND BENEFITS OF THIS RESEARCH .........................279
   7.8.1 Limitations of this research ............................................................279
   7.8.2 Benefits of this research .................................................................279

7.9 MEGAN'S STORY PART 2 .....................................................................280
   7.9.1 On a personal level ..........................................................................280
   7.9.2 In the research context .....................................................................281

7.10 SIGNIFICANCE AND CONCLUSION ....................................................282

LIST OF REFERENCES ..................................................................................285

APPENDIX A PHASE ONE - SURVEY FORM - ORGANISATIONS .................306

Megan Paull: Sensemaking and the management of older volunteers
Part B: Policy .............................................................................................................. 312
Part C: Involving older volunteers .............................................................................. 314
Part D: Some questions about you and your position .................................................. 316

APPENDIX B PHASE ONE – SURVEY FORM – OLDER PEOPLE ............317

APPENDIX C: QUALITATIVE DATA COLLECTION TOOLS .......................328

GROUP INTERVIEW FRAMEWORK .............................................................................. 328
INDIVIDUAL INTERVIEW FRAMEWORK .............................................................. 328
STATEMENT OF DISCLOSURE AND INFORMED CONSENT FORMS ................. 328

APPENDIX D: ADDITIONAL RESULTS FROM PHASE ONE .........................336

PHASE ONE – SURVEY OF MANAGERS ................................................................. 337
PHASE ONE – SURVEY OF OLDER PEOPLE ......................................................... 339
COMPARATIVE DATA FROM BOTH SURVEYS .................................................... 344

APPENDIX E: ETHICAL CONSIDERATIONS ......................................................... 347

NOTES ON ETHICAL CONSIDERATIONS ............................................................. 348
Confidentiality of Records ....................................................................................... 348
Embarrassment or Regret ......................................................................................... 348
Vulnerable Populations ............................................................................................ 349

APPENDIX F: FOLD OUT COPIES OF FIGURES ................................................350
List of Tables

TABLE 2.1: ABS VOLUNTEER PARTICIPATION RATES .............................................................. 59
TABLE 2.2: VOLUNTEER ACTIVITY RATE FOR OLDER AUSTRALIANS 2000 BY TYPE OF VOLUNTEER ACTIVITY .............................................................. 60
TABLE 2.3: REASONS FOR VOLUNTEERING, AUSTRALIA AND WESTERN AUSTRALIA.... 67
TABLE 2.4: EIGHT RESPONSES TO DIVERSITY ............................................................... 67
TABLE 3.1: SAMPLE DISTRIBUTION FOR OLDER PEOPLE SURVEY ..................................... 104
TABLE 4.1: DEGREE OF DIFFICULTY OF DECLINING PERFORMANCE DUE TO AGE ..... 138
TABLE 4.2: PROFILE OF RESPONDENTS ............................................................................... 142
TABLE 4.3: RESPONDENTS TO OLDER VOLUNTEER SURVEY – GENDER BY AGE GROUP ........................................................................................................ 142
TABLE 4.4: REASONS FOR STOPPING VOLUNTEERING ......................................................... 144
TABLE 4.5: REASONS FOR STOPPING VOLUNTEERING ......................................................... 144
TABLE 4.6: REASONS FOR STOPPING VOLUNTEERING ......................................................... 144
TABLE 4.7: VOLUNTEER RESPONSES ABOUT ORGANISATION TYPE ................................. 145
TABLE 4.8: VOLUNTEER RESPONSES ABOUT ACTIVITY TYPE .......................................... 146
TABLE 4.9: VOLUNTEER RESPONSES ABOUT MOST TIME DEVOTED TO ACTIVITY TYPE .......................................................... 147
TABLE 4.10: FEELINGS ABOUT VOLUNTEERING ................................................................. 148
TABLE 4.11: CURRENT REASONS FOR INVOLVEMENT ....................................................... 148
TABLE 4.12A: REASONS FOR CONTINUING TO VOLUNTEER ................................................ 151
TABLE 4.12B: REASONS FOR CEASING TO VOLUNTEERING ................................................ 152
TABLE 4.13: EXPERIENCE RE VOLUNTEER-INVOLVING ORGANISATIONS ....................... 152
TABLE 4.14: COMPARISON OF ORGANISATION AND ACTIVE VOLUNTEER RESPONSES ON EXPERIENCE WITH OLDER VOLUNTEERS ................................................................. 154

List of Figures

FIGURE 3.1: INITIAL RESEARCH METHOD FRAMEWORK ..................................................... 87
FIGURE 3.2A: GIOIA AND PITRE'S PHASES OF DATA COLLECTION WITHIN THE INTERPRETIVIST PARADIGM ................................................................................ 99
FIGURE 3.2B: COMMENTARY ON PHASES OF DATA COLLECTION FOR THIS THESIS .... 99
FIGURE 3.3: DIALOGUE AS A DATA COLLECTING TECHNIQUE ......................................... 108
FIGURE 3.4: TENSIONS EXPERIENCED BY THE RESEARCHER IN ASSIGNING MEANING .... 111
FIGURE 3.5: FINAL RESEARCH METHODOLOGY .............................................................. 119
FIGURE 3.6: BLAIEKE'S SUMMARY OF THE LAYERS OF THE ABDUCTIVE RESEARCH STRATEGY ......................................................................................................... 121
FIGURE 4.1: RESPONDENT ORGANISATIONS – ORGANISATION TYPE ...................................... 132
FIGURE 4.2: RESPONDENT ORGANISATIONS – PERCENTAGE OF OLDER VOLUNTEERS .... 133
FIGURE 4.3: AGE GROUPINGS OF VOLUNTEERS .............................................................. 134
FIGURE 6.1: MAPPING OF VOLUNTEER RESPONSES FROM THE DATA ............................ 241
FIGURE 6.2: MAPPING OF MANAGER RESPONSES FROM THE DATA ................................ 241
FIGURE 6.3A: THEORISING ABOUT MANAGER SENSEMAKING – COMPLEX DEPICTION ... 251
FIGURE 6.3B: THEORISING ABOUT MANAGER SENSEMAKING – LINEAR DEPICTION ... 251

Megan Paull: Sensemaking and the management of older volunteers
<table>
<thead>
<tr>
<th>Acronyms</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABS</td>
<td>Australian Bureau of Statistics</td>
</tr>
<tr>
<td>ACPI</td>
<td>Australian Council of Social Service OR Services</td>
</tr>
<tr>
<td>AIHW</td>
<td>Australian Institute of Health and Welfare</td>
</tr>
<tr>
<td>CAQDAS</td>
<td>Computer Aided Qualitative Data Analysis Software</td>
</tr>
<tr>
<td>CACOM</td>
<td>Centre for Australian Community Organisations and Management</td>
</tr>
<tr>
<td>CIVICUS</td>
<td>World Alliance for Citizen Participation</td>
</tr>
<tr>
<td>DPC</td>
<td>Department of Premier and Cabinet (Western Australia)</td>
</tr>
<tr>
<td>FTEs</td>
<td>Full time equivalents</td>
</tr>
<tr>
<td>HACC</td>
<td>Home and Community Care</td>
</tr>
<tr>
<td>HRM</td>
<td>Human Resource Management</td>
</tr>
<tr>
<td>NCVO</td>
<td>National Centre for Voluntary Organisations</td>
</tr>
<tr>
<td>OECD</td>
<td>Organisation for Economic Cooperation and Development</td>
</tr>
<tr>
<td>OSIV</td>
<td>Office of Seniors Interests and Volunteering (Western Australian government)</td>
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<tr>
<td>PEP</td>
<td>Peer Evaluation Process</td>
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<td>PEPping</td>
<td>Conducting a PEP</td>
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<td>VFI</td>
<td>Volunteer Functions Inventory</td>
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<td>VWA</td>
<td>Volunteering Western Australia</td>
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<td>VWI</td>
<td>Voluntary Work Initiative</td>
</tr>
</tbody>
</table>
Chapter One
Introduction
Managing older volunteers: A subject for study

Chapter Two
Literature Review - Older volunteers and volunteering

Chapter Three
Methodology
Research questions and approach

Chapter Four
Results Phase One
Establishing context

Chapter Five
Results Phase Two
Voices and viewpoints

Chapter Six
Findings
Synthesis and interpretation of results

Chapter Seven
Conclusion
Implications and the future
CHAPTER ONE  INTRODUCTION – MANAGING OLDER VOLUNTEERS: A SUBJECT FOR STUDY

This study explores the experience of managing older volunteers in a number of volunteer-involving organisations in Western Australia. A key focus is providing an account of the experience of managers and volunteers, and exploring their responses to what is termed "declining" performance by the older volunteer. It is concerned with seeking the "self understandings of [the] actors" (Schwandt, 1994, p. 299) and exploring the context in which they occur (Blaikie, 1993; Giddens, 1979; 1993). Understanding the actors' point of view is a hallmark of interpretivist research which provides in-depth insights into the phenomenon under investigation.

1.1 SIGNIFICANCE AND CONTRIBUTION

As this study investigates the experiences of managers and older volunteers, particularly where the manager perceives that a volunteer's performance is declining due to age, it has implications for managers and volunteers, and for the organisations in which they operate. It is significant for several reasons: it offers an in-depth exploration of the experiences managing of older volunteers from the perspectives of managers and volunteers; it explores the manager's understanding of declining performance and explains how manager sensemaking contributes to this understanding; and it offers a direction for research into the management of the performance of older workers in the paid workforce.

The first contribution flows from a lack of a comprehensive in-depth examination of the experiences of older volunteers and managers. Given that older volunteers are being actively recruited to participate in volunteer-involving organisations (e.g. TEAM Consultants, 2001; Heartbeat Trends, 2001; Warburton, 1997), and that older volunteers tend to contribute more hours to the organisations in which they work (Lyons & Hocking, 2000), their management is an important issue for managers and organisations. Managers have indicated that managing older volunteers is somehow different to managing other volunteers (Paull, 2000). An understanding of this can only contribute to better management. In addition this study contributes to an understanding of the status of volunteers and volunteer managers.
within organisations, and within society, and the impact this has on the capacity of the managers to undertake their role.

This study is also significant in gaining insight into what managers perceive as "declining" performance by older volunteers. Currently there is scant literature which explores what is meant by this, and what literature there is tends to be more practitioner-oriented, prescriptive literature or more broadly focussed. McCurley (2004), for example, offers suggestions for managers about retiring older volunteers or redesigning their work as they become less capable. Work done by Fischer and Schaffer (1993) in the US and Forster (1997) in the UK discusses the issue of declining performance due to age as part of a larger work and does not provide in-depth material. This study provides an in-depth exploration of the sensemaking processes which take place for volunteers and for managers of volunteers when changes occur in the performance of a volunteer who is also ageing. By providing insight into what managers and volunteers consider to be "declining" performance, this study contributes to the overall understanding which can only be gained by hearing the voices of the actors themselves.

A third and related significance of this study is the management of older people in the paid workforce. Managers of volunteers have been tackling performance issues with older volunteers for a long time, whereas managers of paid employees have only recently had workers over about 65 years of age under their supervision. The introduction of anti-age discrimination laws, and the abolition of compulsory retirement at 65 means that some of the experiences of managers of older volunteers may provide insights which are useful to managers of older workers. This thesis contributes to the growing literature on the social construction of age and how this can lead to unwitting discrimination against older people on the basis of assumptions which are made about their capabilities, and about how to address changes in capabilities. It is important at this point to distinguish between "performance management" as understood by Human Resource managers as a formal system linked in with Performance Appraisal and the day-to-day managing of performance as undertaken by line managers which is the focus of this investigation. The use of feedback in the management of performance was the focus of Masters level research undertaken as a predecessor to this research and whilst in both studies the influence of
formal performance management systems emerges, it is beyond the scope of this study to explore this aspect other than as it emerged from the data.

The methodological gains derived from the approach taken in this study can also be considered to be a significant contribution to knowledge. In-depth exploration of the actors' points of view yielded evidence about sensemaking processes encountered by managers and volunteers, about a progression in understanding which highlighted the importance of dialogue on ageing and performance, and about emotional barriers which impede such dialogue. The employment of sensemaking as a diagnostic tool offered insights which might not otherwise have been available.

1.2 RESEARCH QUESTIONS

The study has as its focus three major research questions to provide orientation for the methodology, including data collection techniques, analysis and synthesis of results.

The main research focus on "declining performance of older volunteers" evolved to a focal question which sought data on the experiences of the managers and the volunteers where this occurs:

**Question 1:** What are the experiences of managers and older volunteers when a manager believes that an older volunteer's performance is declining due to age?

This question is nested in two further questions which provide data about the setting in which the first question takes place:

**Question 2:** What are the ways management of older volunteers is experienced by volunteers and managers in volunteer-involving organisations in Western Australia?

**Question 3:** What are the major contextual factors which are contributing to those experiences?

In keeping with a grounded theory approach these questions served only as the starting point for the research and analysis and theory generation involved following the directions indicated by the data, and developing insights based on the data itself and not bound by the research questions. The research questions were explored through the literature review, a quantitative study which was intended to provide an overview of context, and by individual and group interviews with managers and volunteers which provided the depth needed to generate theory from the data.
As the study progressed a further area for exploration came to light and an emergent research question became an important element of the study:

**Emergent question:** What is meant by “older” volunteers?

The emergence of this question is in keeping with the research approach adopted, and further contributes to an understanding of the focal question. It also led to an exploration of socially constructed understandings and their contribution to management interaction with volunteers.

### 1.3 BACKGROUND

Australia has an ageing population, and there are constant calls for working Australians to delay retirement, and for those who are retired to put back into the community by volunteering their knowledge, skills and experience. Older people are seen as a rich resource for the nation to draw upon as the demographic changes associated with the baby boomer generation lead to a change in the profile of the workforce and of the population in general. Calls for older people to remain in the workforce, and the abolition of compulsory retirement ages mean that managers in the paid workforce will increasingly be required to manage the performance of older people. This is something that managers of volunteers have already been experiencing for a number of years. In a previous study, (Paull 2000, discussed below), on managing the performance of volunteers, managers of volunteers identified that managing older volunteers is somehow different to managing other volunteers. Their experience can provide valuable insights for the managers of older workers.

The purpose of this research is to gain a rich understanding of the experiences of managers and older volunteers in volunteer-involving organisations, and to identify what is happening when managers indicate that managers of volunteers indicate that managing older volunteers is somehow “different” from managing other volunteers. By analysing volunteer and manager experiences certain questions may be answered: Who are “older volunteers”? What makes managers categorise them as different to other volunteers? What is happening when managers perceive that their performance is declining? What sort of actions do managers and volunteers take? How do volunteers respond to these actions? What elements of the context of volunteering are contributing to the picture?
Seeking a rich understanding necessarily involves an in-depth approach with the capacity to gain insights into the actors' own interpretations and understandings of their actions as they create and recreate their world. Such an approach requires two things: an understanding of context; and an exploration of the actors' own perspectives on their experiences within that context.

1.4 IMPETUS FOR THE STUDY

Previous research carried out for my Master of Business (HRM) was specifically related to managing the performance of volunteers. In a quantitative foundation study which examined human resource management systems in volunteer-involving organisations in Western Australia, it became apparent that there was significant variation in the nature, type and extent of performance management systems in place (Paull, 2000). In the study, which examined the use of feedback to manage poor or declining performance, several key themes relevant to the current study emerged:

- Volunteers do like to know how well they are performing and specific feedback which offers guidance as to how to improve performance is appreciated by most.

- More important than the feedback, however, is the culture and climate in which the volunteers are working. Where the culture and climate is one in which the volunteers feel appreciated and valued, and the communication is considered to be good, volunteers and managers feel more comfortable about giving and receiving feedback about performance.

- Managers indicated that managing older volunteers was somehow different to managing other volunteers. In particular, managers had concerns about managing the performance of some older volunteers whose performance they believed to be declining. This was not central to that study and was not pursued in any detail at that time.

- It was evident that the quantitative data alone, while valuable in painting a picture of management systems in organisations, was insufficient for the exploration of the topic, and the use of in-depth interviews and discussion groups provided perspectives and insights which were not obtained from the quantitative data collection process.

- That study also highlighted the interest that many managers of volunteers have in their volunteers and the quality of management they seek to offer to their volunteers and their organisations.

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1 They also indicated that managing people living with mental illness was different but that concern has not been pursued here.
1.5 Scope of the Literature Review

A review of the literature was an ongoing process in the conduct of this study, and in keeping with the methodology was updated at the conclusion of the study as elements of the theory building process emerged. The literature review, Chapter Two, illustrates the pre-paradigmatic or neo-disciplinary state of research in the field and shows how this contributes to the context in which volunteer management takes place. It demonstrates that there is considerable and increasing interest in volunteering as a subject for research, but that Australia is somewhat slower in taking up research on volunteering than the UK or North America.

Section 2.3 of the literature review explores the tensions inherent in the field, including terminology and definitions, and the quantification, measurement and valuation of volunteering. It illustrates how this has contributed to the contradictory societal status of volunteering – at the same time valued and ignored – given that there is limited quantification of its contribution to society and the economy.

The next part of the literature review (2.4) examines the extant literature on older volunteers, considering the varied viewpoints on “who are older volunteers”. It then illustrates that while older volunteers have been a subject for research there has been limited attention paid to exploring the shared understanding between managers and older volunteers about how they should be managed, and that no study has sought to understand the concept of “declining” performance due to age from the perspective of volunteers and managers.

The literature review next considers older workers in the paid workforce as a part of the context in which volunteering takes place. In particular it reveals that the current literature on older workers refers to a somewhat younger cohort, and that studies about older workers have yet to address workers who are in transition between what is known as the third age characterised by activity and independence, and the fourth age characterised by frailty and independence. Section 2.5 briefly discusses research on older workers in paid employment after which the literature on managing volunteers, in particular older volunteers, is examined (Section 2.6). Finally, managing difference is explored, particularly as it relates to the capabilities framework, an approach used by the United Nations as part of their index for quality of life.
In summary the literature provides a range of conclusions which contribute to the development of the research:

- Managing volunteers is seen to be different to managing paid workers, partly due to the philosophical underpinning of volunteering, and partly due to the different psychological contract between the volunteer and the organisation.
- It is clear that the older people who volunteer bring wisdom, time and experience to their organisations. They volunteer for a number of reasons, some of them different from their younger counterparts.
- Increased pressures on managers and their organisations with regard to performance standards and expectations are identified in the literature review. Requirements placed on organisations may clash with the wellbeing needs of the individual volunteer. It is clear from the literature that the potential effects of declining performance associated with age have not been examined in-depth or from the perspective of the volunteer.
- It is clear that managers of paid workers have yet to experience ageing workers in any great numbers, but assumptions, myths and stereotypes have already been found to play a role in their management. The social construction of age means that despite evidence to the contrary older paid workers are considered by managers to require a different management approach to their younger counterparts.

A number of propositions arose from the review:

- Exploration of the experiences of the volunteer and the manager may assist in better understanding the management of performance in older volunteers.
- Differing assumptions by volunteers and managers about who are “older volunteers” and of the capabilities of older volunteers may play a role in the evaluation of performance of older volunteers.
- If the recruitment of baby boomers into volunteering is to continue the numbers of older volunteers are likely to increase, and thus the incidence of this situation is likely to increase.
- It is likely that if the pressure for people to work beyond retirement age continues, and as those who have chosen not to retire age, the paid workforce is also likely to begin to encounter similar sorts of issues.

23
A significant amount of the literature canvassed was prescriptive and practitioner oriented, part of a larger and less focussed study, positivist in its approach. Much of the small amount of qualitative research examined had been conducted within a positivist framework. The literature review demonstrated a need for in-depth research which examines the involvement of older volunteers in organisations from the perspective of both the manager and the volunteer, in particular the situation which arises when the manager believes that a volunteer is not performing to the standard required by the organisation.

The current study was undertaken in an interpretivist paradigm to seek to address the gaps in the extant literature and to gain a more in-depth understanding of the perspectives of the managers and the volunteers on the management and involvement of older volunteers.

1.5.1 A note on terminology

Within an interpretivist paradigm terminology and definitions are the province of the actors, with the actors’ understandings being part of that which is being sought. That being said, the emergent question on who are older volunteers was developed after an initial arbitrary definition of “older” being 50 or 55 and over in keeping with the classification of “older” from the Positive Ageing Foundation having been adopted for the survey phase of data collection.

Further the issue of performance management as it is discussed throughout this study is considered to be a more general term referring to day-to-day management of performance by managers rather than “performance management” as it is known to human resource managers as a specialist term. This was not an area where contradiction between the understanding of the actors and the assumptions at the commencement emerged during the study. This is despite the fact that one of the areas in which data surfaced differences which elucidated aspects of day-to-day performance management was a peer evaluation form of the more specific human resource management understanding of performance management.

1.6 METHODOLOGY, EPistemology AND RESEARCH APPROACH

Chapter Three describes the basis for collecting and analysing data (the research assumptions, approach and techniques used). In this study the research
approach sits within an interpretive epistemological paradigm. Key assumptions of this paradigm are as follows.

- The basic nature of social reality is subjective and social life is based on the interactions between the actors and their contexts which then form their socially constructed meaning systems.
- People are constantly interpreting the social world as it evolves and they use their interpretations to make sense of their lives and of the world around them.
- Facts are fluid and embedded in the context, and people assign meaning in context, thus both situational and voluntary factors influence human behaviour.
- "Truth" arises from the reality of those being studied, and theories are "true" if they make sense to those being studied. This methodology allows others to enter and understand the "truth" of the actors.
- The goal of the research is to discover and share the perspective(s) of the actor(s).
- Research is ideographic, providing a symbolic representation of the social setting and the actions and experiences of the people being studied; it tells a story and requires first hand knowledge of the subject under investigation.
- The researcher is part of the research and brings his or her own values and points of view to the research, engages with the research and with those being studied, and is involved in a process to empathise with and share the values of the actors. (Burrell & Morgan, 1979; Neumann, 1997)

The interpretive approach, as opposed to a positivist approach, provides a foundation for research that is sensitive to the context in which the actors or informants operate, applies a number of methods to explore and examine how they see their world, and is concerned with what Neumann (1997, p. 73) refers to as "an empathic understanding of feelings and world views". The socially constructed world view of the actors is important as they continually create and recreate their understanding of the context in which they operate, and undergo a continuous process of sensemaking about their interactions.

Adoption of an interpretive approach is in keeping with further exploring the finding from the earlier study that managers felt that managing older volunteers was somehow different to managing other volunteers, especially when they perceived that there was "declining" performance due to age. It is also consistent with the identification from the literature that there was a need for in-depth exploration which addressed the issue of managing older volunteers from the perspective of managers and volunteers, and the context in which this takes place.
The selection of research techniques needed to address both context and the perspectives of the actors. A two-phase study was selected. Phase One involved two questionnaires to clarify the context in which the research was taking place. A total of 232 older persons included on an older persons database responded to a questionnaire mailed to 500 people. A stratified random sampling technique was employed to try and achieve a balance of genders, a variety of ages from 50 years up and a spread of postcodes including in regional Western Australia. In addition 45 managers responded to a questionnaire mailed to 100 organisations considered to be likely to involve older volunteers. Simple quantitative data analysis was undertaken, largely of a descriptive nature to gain a picture of the nature and type of volunteer activity being undertaken by older volunteers and a broad view of managers and volunteers. This phase of the study provided some background and context for Phase Two which was the more in-depth part of the study.

The research techniques employed in the second phase involved individual and group interviews with managers and volunteers based on a loose framework which evolved as the study progressed. Concurrent data collection and analysis took place in this grounded theory approach to data analysis and theory generation. This is an iterative approach, with several steps occurring simultaneously and outcomes from data analysis informing further data collection as well as the reverse. During the data analysis and theory generation process, sensemaking came to the fore as an appropriate diagnostic and explanatory tool. At the same time, the importance and suitability of the in-depth qualitative data collection method and the abductive grounded theory approach to data analysis became more apparent.

Sensemaking, a concept scrutinised and further developed by Karl Weick (1995) during the 1990s, is a theory consistent with an interpretivist and social constructionist view of the world. In this view the actor is considered to be knowledgeable and experienced and to draw on this knowledge and experience to make and remake their understanding of events and experiences as they unfold. The employment of sensemaking to analyse and explain the data which emerged from this study is a methodological gain derived from the in-depth inquiry undertaken.
1.7 FINDINGS OF THE STUDY

The study findings are presented in three chapters. The first of these, Chapter Four, is concerned with key elements of the quantitative data collection phase. It reports a small amount of the descriptive data from the two questionnaires administered in Phase One of the study. It provides some insight into the context of volunteering in volunteer-involving organisations in Western Australia. It concludes with a summary of the elements of this phase of data collection which informed data collection and analysis for the interviews and group discussions which followed. It is important to note here that the quantitative data collected reinforced the importance of the choice of an in-depth qualitative study to investigate the phenomenon under investigation.

Chapter Five lays out the data from the in-depth interviews and group discussions, and introduces key themes and ideas which emerged from the data. It provides insights into the shared understandings of the actors, and illustrates the varied understandings of the concepts of age and how these influence judgements and actions by managers and volunteers. It also reveals the lurking spectre of paid work and its influence on the patterns of thinking taking place and influencing the context in which actors are carrying out their roles. The data reveals the thinking of the managers and the volunteers about changes in performance, and about managing these changes. It examines the actions of managers in following up on changes in performance, and details the responses of the volunteers. This chapter also presents data on the interaction of the methodology with the data and reports on methodological gains achieved by the use of in-depth data collection methods.

Chapter Six provides a synthesis of the findings of the research. This synthesis reveals how the social construction of age and ageing converges with the paradoxical status of volunteering within organisations and society. The convergence of these conspire to deprive managers of the resources (money, time, knowledge and skills) to successfully manage older volunteers in transition between active and independent third-agers and less active and dependent fourth-agers in a manner which offers dignity and respect. This chapter presents findings at the micro level of day-to-day management of the performance of older volunteers, suggesting that a peer/partner approach will benefit all concerned. It demonstrates how sensemaking takes place for managers who encounter an interruption or change in the performance of a volunteer,
and how this manifests itself in action. It demonstrates that a direct peer partner approach to a direct conversation with the volunteer is the approach desired by volunteers and one in keeping with the capabilities approach which offers dignity and respect to all individuals by acknowledging their capabilities. The chapter also presents discussion at the macro level where consideration is given to the shedding of unconscious stereotypes and the removal of taboos about discussing old age and frailty, and examines the contradictory view of volunteering as something to be admired and dismissed. It adds a further voice to those calling for greater recognition for volunteers, including greater recognition for the work of those who manage volunteers.

Chapter Seven offers a conclusion to the study which considers the implications of these findings, for volunteers, for managers and for volunteer-involving organisations. It outlines the significance of the study and highlights the contribution to knowledge made by the in-depth exploration of the research questions. Chapter Seven also considers the implications for the paid workforce, as the workforce ages, with consideration as to how the experiences of older volunteers and their managers can inform paid employees and managers of paid workers and the organisations in which they work. The chapter highlights directions for further research and rounds off the research with some personal insights.

1.8 MEGAN'S STORY — PART 1

1.8.1 In the research context

As an active volunteer and a long term researcher in the area of volunteering, my engagement with the research topic was central to this study. It provided me with the topic, gave me access to organisations on a sensitive subject (despite the reservations of gatekeepers) and allowed me to keep up the momentum despite slow progress and changing circumstances. It is a hallmark of this type of research that the researchers are part of the research and bring their own values and points of view to the research. Engagement with the research and with those being studied is part of the process of involvement which includes empathising with and sharing the values of the

2 Part 2 is in Chapter Seven.
actors. This is further pursued in the methodology chapter (Chapter Three) but it is important to an understanding of the interpretive processes which have been exercised in this research to include a self portrait at the outset.

1.8.2 On a personal level

It is a truism in volunteering that volunteering is “in the blood”, that volunteers learn their values and approach to volunteering from their families, and while this is not the case with all volunteers it is a subject which has been examined by British researcher Margaret Harris (2001a; 2001b). My own family involvement with volunteering goes back to my maternal grandparents having been widely involved with school, church and community service activities over many years. My paternal grandparents were known to have always been available to take on informal volunteering roles to help out family, friends and neighbours as required. My parents, living in country towns when I was a child, were always active in the local community, and once we moved to the city were involved in school based volunteering and amateur theatre among other things.

At the time of my entry into volunteering research my mother was the Executive Director of Volunteering Western Australia, and while I sought to establish my own credibility in volunteering in Western Australia, my immersion in the field was in part due to my connections with her. At a local level, however, I have enjoyed volunteering on committees and in roles associated with my children and taken an interest in local community organisations. Within the University system I have involved myself in the post graduate student association at committee level, and was a student nominee on the faculty research and higher degrees committee.

With volunteering as a passion, and management and Human Resource Management as my areas of scholarship it seemed like a logical and natural confluence that volunteer management would be the focus of my research. Part 2 of my story is included in the final chapter of this thesis, as it unfolds the journey I have undertaken with this study.

1.9 SUMMARY

This chapter has introduced the reader to a study which examines a phenomenon identified in earlier research relating to the management of older
volunteers. Key elements of the literature review, the methodological approach and the significance and contribution of the research have been outlined as have the research questions investigated. The reader has also been introduced to the researcher, whose immersion in the field is both a contributing factor to the analysis and understanding, and a factor in the type of research being undertaken. The next chapter provides an examination of the literature and sets the scene for the research.
ORGANISATION OF THE THESIS

Chapter One
Introduction
Managing older volunteers: A subject for study

Chapter Two
Literature Review
Older volunteers and volunteering

Chapter Three
Methodology
Research questions and approach

Chapter Four
Results Phase One
Establishing context

Chapter Five
Results Phase Two
Voices and viewpoints

Chapter Six
Findings
Synthesis and interpretation of results

Chapter Seven
Conclusion
Implications and the future
CHAPTER TWO LITERATURE REVIEW – OLDER VOLUNTEERS AND VOLUNTEERING

2.1 INTRODUCTION

This chapter undertakes an examination of literature relevant to this study. The first part of this review (Section 2.2) argues that volunteering research is in a pre-paradigmatic state, which might be likened to the neo-disciplinary state of organisation studies described by Burrell, Reed, Alvesson, Calas and Smircich (1994) at the launch of the journal *Organization* in 1994. The review then reveals the context in which this study took place (Section 2.3), including the tensions and contradictions in the defining and measuring the field of volunteering, and the impact this has on the status of volunteering in the community, especially in relation to paid work. Section 2.4 of this review examines both scholarly and practitioner oriented literature relating to older volunteers, including management and performance of volunteers, and identifies research gaps and deficiencies, particularly in Australia. It then goes on to tap into the literature on the management of older workers, particularly in relation to performance, and identifies that while there is extensive research on this topic, “older workers” tends to refer to those in a younger age bracket than those generally considered to be “older volunteers”. The research on older paid workers provides evidence of the existence of myths and stereotypes, and of assumptions which impinge on managerial judgements of performance. This review concludes with an overall view of the literature which establishes that an in-depth examination of the perspectives of managers and volunteers on managing the performance of older volunteers will address a gap, and provide insights not available elsewhere.

2.2 VOLUNTEERING: A PRE-PARADIGMATIC DISCIPLINE

2.2.1 Geographic spread

Research into volunteering in the UK, the US and Canada has been steadily developing over a 30-year period, with the last ten years seeing a significant increase. This is due, in part, to the government support for such research, which came in the US following President Bush’s Thousand Points of Light Initiative announced in 1989.
to “encourage volunteer service for citizens of all ages” (Renninger, 1998, p. vi). In Britain, research in volunteering has largely come from two major players: the National Centre for Volunteering, and the National Centre for Voluntary Organisations. The National Centre for Volunteering, having already developed a track record for research into volunteering, established the Institute for Volunteering Research with the assistance of the University of East London, and the Lloyds TSB Foundation (Howlett, 2000). A second peak body in Britain, the National Centre for Voluntary Organisations (NCVO), has also taken an active role in research associated with volunteering. Their focus is not only on volunteering but on the “voluntary sector” discussed below. Research on volunteering across Europe is varied, and while some of it is accessible in the English language literature, much of it is still unavailable to English speakers.

Funding of research in the UK, Canada and the US is often government or foundation based, a situation not replicated in Australia to the same degree. In the UK the Home Office has funded extensive research into the voluntary sector including volunteering (e.g. Home Office Active Community Unit, 1999; Home Office for the United Kingdom & National Council of Voluntary Organisations, 1998; Home Office for the United Kingdom – Working Group on Government Relations Secretariat, 2001). In Canada, too, the government has spent money on voluntary sector research including volunteering (Hall, et al, 2001; National Volunteerism Initiative Joint Table, 2001). Australian government efforts have largely been confined to the efforts in relation to Australian Bureau of Statistics (ABS) data collection and to funding of research through volunteer sector organisations.

2.2.2 Nature of the research literature

The literature associated with volunteering is not confined to one type or location. There is a great deal of “in house” or “within membership” style literature in the form of newsletters and other communications. These contain valuable data which provides insights into what is important to organisations and to volunteers; however, these are often very organisation specific.

There are a number of newsletter and magazine style publications, referred to as practitioner style literature, world-wide which have a focus on volunteering or on nonprofit/voluntary/third sector activities. These include such publications as
Nonprofit Times and Fundraising Management. In addition, there are a number of journals which are not purely academic and these include the Journal of Volunteer Administration (US), and the Canadian Journal of Volunteer Resources Management. At a more academic level, The Australian Journal on Volunteering and Voluntary Action (UK) include refereed articles as well as practitioner focussed material, and both journals are making efforts to ensure that published material is accessible to practitioners. There is also a range of more academic journals – Nonprofit Management & Leadership, Nonprofit and Voluntary Sector Quarterly, Voluntas: International Journal of Voluntary and Nonprofit Organizations and Third Sector Review. These more academic journals devote time to the discussion of more theoretical and sociological perspectives on volunteering and on the third sector.

Research on volunteering is not only found in these publications, however, as much of what is published appears in publications associated with the researchers' own discipline – business, psychology, sociology, or in publications associated with the places in which volunteers are active – politics, tourism, education, social welfare, health. This spread of research across academic fields is further evidence of the neo-disciplinary or pre-paradigmatic state of the field.

As an area for study volunteering is becoming more popular. In the early 1990s Lohmann (1992) identified 80 schools and programmes world wide which were studying nonprofit and voluntary sector activities. Volunteering, as a subset of this area of study, is increasingly being researched. May (1996) argues that volunteering is a subject worthy of study and outlines the various disciplines and their interest in volunteering. Howlett (2000) outlines the establishment of an institute in the UK specifically to study volunteering, as part of the increasing recognition of the role of volunteers in community development, The Institute for Volunteering Research. In 2001, the United Nations International Year of Volunteers, there was greater impetus for research into volunteering through grants and projects provided by governments. The intervening five years have seen a number of PhDs and major studies undertaken in the area of volunteering, all contributing to this growing field. Davis Smith (2006, p. 9) argues that the growth of the volunteering research agenda in the last 25 years has seen several phases with the third phase from the mid 1990s “marked by an explosion of work in the field”.

34
2.2.3 The Australian scene

Unlike our US, Canadian and UK counterparts, Australia was slow in taking up research into volunteering, with sporadic, uncoordinated and isolated research taking place in pockets across the country. It is unclear why this is the case, but it might be speculated that this is due to the lack of charitable foundations interested in funding such research in Australia, and to the lack of government funding set aside for such research. In 1992 Wynands (1992) observed that research into volunteering in Australia was limited. In 2000 Roe (2000) indicated that while in the nearly ten years since then there has been an increase in the level of research, volunteering in Australia was still under-researched. A recent research symposium held in Melbourne highlighted that while there are an increasing number of researchers in the field, they are not numerous and the research community has still not embraced volunteering as a topic. Unlike the “explosion of work” highlighted by Davis Smith (above) the Australian scene is characterised by a steady expansion and a growth of academic interest more akin to what Davis Smith referred to as the second phase in the global sphere. In the post 2001 era Australian research has received more attention and more funding, and government interest in research is growing. Concerns have been expressed, however, by senior Australian academics that the new Research Quality Framework threatens research in the volunteering field as universities are forced to focus their research attention on the type of research which attracts greater recognition under the framework (expressed at the inaugural Volunteering Research Symposium held in Melbourne in 2006 by Volunteering Australia).

In 2000 volunteering in Australia was seen to be “in transition and subject to contradictory forces” (Roe, 2000). The Australian Journal on Volunteering has served to bring some of the research together but there is still work being undertaken which is only being reported in the field in which it is undertaken (e.g. health, sport) or in the state or organisation which is the focus of the research. The majority of research into volunteering is positivist in nature, with qualitative research beginning to emerge in the field. Some recent studies have used qualitative techniques, and mixed method techniques, to add depth and understanding to the projects in which they were employed. In Western Australia, research which explores the views of the Baby Boomer generation on volunteering (TEAM Consultants, 2001), and on the barriers to volunteering by jobless people (Cockram, 2002), South Australian research into the
views of Indigenous and people of non-English speaking backgrounds (Kerr, et al, 2001), and Tasmanian research on the experiences of Emergency Services volunteers (Fahey & Walker, 2001), have all employed qualitative techniques as part of their data gathering process. More recently, research into volunteering by “grey nomads” or retirees who travel the country in camper vans or caravans (Onyx & Leonard, 2006) and migrant volunteers (Wilkinson & Mar, 2006) has sought to employ qualitative techniques to understand the experiences of the individuals participating in the study.

In 2006, some of the types of research being undertaken are focussed on:

- emergency services volunteers (Cowlishaw & McLennan, 2006; McLennan, Birch & King, 2006; Stirling, 2006),
- measurement and the economic value of volunteering (James & Mack, 2006; Lyons, 2006),
- older volunteers (Onyx & Leonard, 2006; Warburton & Dann, 2006),
- migrant volunteers (Wilkinson & Mar, 2006);
- environmental volunteers (Bryen, 2006); and
- volunteers in sport (Engelberg, Skinner & Zakus, 2006).

Recent/current Australian PhDs in the area include emergency services volunteers (Stirling, 2006), Environmental volunteers (Gooch, 2003), International volunteers (Deveraux, 2006) and Corporate volunteering (Wood, 2004). Work is being undertaken across a range of universities and a range of disciplines – Griffith University; University of Tasmania; Queensland University of Technology; University of Technology, Sydney; La Trobe University; University of Western Sydney and University of Queensland - management, ageing, leisure, emergency services, rural health, accounting and history. In the main this work is being undertaken in the particular area with which it is associated, for example, sport, ageing or social work and social policy.

A small amount of work is being undertaken under the auspices of the peak bodies (e.g. Cockram, 2002). Centre for Australian Community Organisations and Management (CACOM) at the University of Technology, Sydney, has been conducting research into the community sector for a long time, and some of the research which touches on volunteering comes out of this centre (e.g. Giving Australia, 2005; Lyons, 2001). The Centre for Philanthropy and Nonprofit Studies at the Queensland University of Technology is another research centre with volunteering
as one of the key pillars of its research programme with the partnership with Volunteering Australia leading to such reports as *The Rising Costs of Volunteering* (Costs of Volunteering Task Force, 2006) presented to government at the end of 2006, and to *Giving Australia* (2005) study and the Inaugural Volunteering Research Symposium hosted by Volunteering Australia in Melbourne in 2006. The impetus for an “explosion of work” to occur in Australia seems to be lacking at present, with any and all research being subject to both funding constraints and to the transition being experienced in the academic world as the new Research Quality Framework is introduced (Jenny Onyx, personal communication at conference, March 2006).

2.2.4 A pre-paradigmatic discipline

It is clear from the literature, some of which is discussed in the next section, that volunteering as a subject for research is still seeking identity as a discipline, and has yet to establish clear assumptions and schools of thought. There are significant tensions and contradictions in terminology and definitions, as well as difficulties in delineating the boundaries of a sector or quantifying the contribution of volunteering. Researchers in the field come from disparate disciplines and, particularly in Australia, research is still in its adolescence. This means that there is scope for innovative research and passionate pursuit of understanding, but it also means that researchers work in isolation with only limited contact with other researchers in the field, and that research is undertaken against a backdrop of limited traditions and considerable inconsistencies. The next section of this review examines this context at both the academic and practitioner level to provide an understanding of this backdrop.

2.3 CONTEXT

In addition to the neo-disciplinary or pre-paradigmatic state of volunteering as a field for research, the broader context of volunteering is a significant contributor to the context in which this study took place. This section of the review examines the field and considers how this contributes to the status of volunteering.

2.3.1 Tensions and contradictions in the definition of volunteering

There are a number of issues associated with the terminology of volunteering which are apparent from a review of the literature, and are significant to understanding the context in which the current study took place. In the last fifteen
years or so there have been calls to review terminology for pragmatic reasons such as communication (Noble 1991; 2000); measurement (Anheier, Knapp & Salamon, 1993; Salamon & Anheier, 1994; 1995; Salamon & Anheier, 1998a) and comparability of findings (Paull, 1999). Over a decade ago, Cnaan and Amrofell (1994) reviewed over 300 articles and found that many of these assumed that the terms “volunteer” and “volunteering” were universally understood. They found such an assumption was unfounded and that considerable variation in interpretation of the terms existed. It appears this is still the case despite efforts in the interim, and despite the efforts of many to count and measure volunteering (e.g. ABS, 2001; Dingle, Sokolowski, Saxon-Harrold, Davis Smith & Leigh, 2001; Hall, McKeown & Roberts, 2001; Ironmonger, 1998; 2000; 2002; Wilson, 2001).

In a briefing paper prepared for a United Nations Expert Working Group meeting held in New York in 1999, leading British volunteering researcher, Dr Justin Davis Smith, considered the meaning and definition of volunteering, and how it manifests itself in various contexts. Dr Davis Smith who heads up the Institute for Volunteering Research in the UK, based his briefing on his own extensive research (e.g. Davis Smith, 1992a; Davis Smith, Rochester & Hedley, 1995; Davis Smith, 1996; 1998; Lynn & Davis Smith, 1992) and on the extensive work of others researching and practising in the field and conducting international comparative studies (e.g. Lyons, 1994; Lyons, Wijkstrom & Clary, 1998; Salamon & Anheier, 1995; 1998a). His paper argued that there are five key elements to a broadly constructed framework which help to create shared understanding: reward, free-will, organisational setting; benefit and commitment. These five elements are discussed in more detail shortly. Davis Smith concluded that “it is clearly not possible to come up with a hard and fast definition of volunteering” (Davis Smith, 1999, point 7). His framework was developed as a tool for discussion where the aim of the expert group meeting was to “make proposals on how governments could best support volunteering.” (Davis Smith, 1999, p. 2).

Despite the conceptual framework and accompanying typology (see below) developed by Davis Smith, and the subsequent discussions on volunteering which have taken place all over the world Davis Smith, at a conference in Melbourne in 2006, identified that terminology and definitions is still an area of debate and
discussion, and should continue to be so. This is reflected in a list of research priorities developed at that conference (Volunteering Australia, 2006).

The author of a study conducted in Western Australia has argued that:

'volunteering' is in fact both culturally constructed and culturally specific, and people from other cultures and societies may hold very different understandings (Martin, 1999, p. 23).

This observation about cultural construction is consistent with the view of Davis Smith (1999) about definitional differences between countries. Davis Smith observes that the economic, social and political dimensions of countries are factors in the way in which volunteering is carried out in each. He also observes that religion is a major influencing factor in the practice of volunteering. The social construction of the term volunteering is influenced by the cultural and religious context in which it is operating. Within multicultural Australia this may also mean that the practice of volunteering will be influenced by the cultural, ethnic and religious affiliations of the individuals, as will their propensity to characterise their activity as “volunteering”.

Official definitions of volunteering have been developed for a number of purposes, one of which is that developed by the ABS for its inaugural survey of voluntary work. The ABS designated a volunteer as “someone who willingly gave unpaid help, in the form of time, service or skills, through an organisation or group.” (ABS, 1996, p. 31). They did not specifically define voluntary work, despite this being the title of the survey. This definition was again used in data collection for a similar survey in 2000 (ABS, 2000).

The Australian Council of Social Service (ACOSS) in its paper Volunteering in Australia defined voluntary work as work which is:

Done of one's own free will;

Provides a service to the community;

Is done without monetary reward, excluding out of pocket expenses. (ACOSS, 1996, p. 5).

The ACOSS paper observes that “volunteering is work. It is also an expression of active participation in the civic life of a democratic society” (p. 5). This conceptualisation of volunteering as both “work” and civic participation highlights two of the contradictions to be found in the social construction of volunteering:

- the delineation of volunteering and its relation to paid work; and
• its importance as an activity which contributes to civil society.

The tensions associated with defining the concept of volunteering characterise the setting in which the current study took place, and are inherent in many of the definitions in place. The peak body for volunteering in Australia, Volunteering Australia, adopted a definition of volunteering for inclusion in their Volunteering Standards Manual during the 1990s:

Formal volunteering is an activity which always takes place through not-for-profit organisations and projects and is:

- Of benefit to the community and the volunteer;
- Undertaken of the volunteer’s own free will and without coercion;
- For no financial payment; and

This definition goes on to specifically exclude:

- Labour performed through community service orders;
- Work-for benefit-schemes with do not allow the individual to choose to volunteer; and
- Student work experience.

This definition contains all of the elements of Davis Smith’s framework referred to above. What is interesting is that the latest version of the principles (Volunteering Australia, 2005) has been altered but still reflects the tensions discussed below.

2.3.2 Davis Smith’s framework

Reward

Most important to this discussion is the clear separation of volunteering from paid work. In developing definitions discussion has often focussed on this distinction. For example, the Principles of Volunteering promulgated throughout volunteering peak bodies in Australia include a provision that volunteers not take the place of paid workers, a provision which has been seen to be quite important in the eyes of unions (Volunteering Australia, 1998 n.p.). In Davis Smith’s words (1999, p.3)

the key cut off point in drawing the distinction between volunteering and paid employment is that the volunteer should not be undertaking
The activity primarily for financial gain, and that any financial reimbursement should be less than the value of the work provided.

The United Nations Expert Working Group for which Davis Smith prepared his briefing concluded that while volunteering should not be undertaken primarily for financial reward, there may be reimbursement of expenses or token payment.

The “unpaid” aspect of volunteering is a key concept as the distinction between paid and unpaid work is important to the status and profile of volunteering (discussed below). This paid/unpaid work distinction is one which has received attention from researchers in a number of fields including economics and labour studies (e.g. Beneria, 1999; Baines, 2004), and one which plays a key role in the findings of this research. The majority of definitions of volunteering endorse the concept that volunteering is undertaken without expectation of payment. For example, ABS did not exclude those who received reimbursement of expenses for their volunteer work, but did exclude those who received payment in kind (ABS, 2001, p. 44).

Issues such as reimbursement of expenses and payment of a stipend (living allowance) to international volunteers have been the subject of some discussion for a while. These have been added to by programmes such as the Voluntary Work Initiative (VWI) in Australia, one of the options under “mutual obligation” requirements for those receiving social security benefits (Volunteering WA, 2001). This recent lack of clarity is an important area of discussion, but generally now the notion of reward is not clear cut. There is an understanding that volunteers are not paid for their work, but that there may be a financial element in their volunteering. These include:

- reimbursement for expenses, thus removing barriers which might prevent people from lower socio-economic background from volunteering;
- payment of an honorarium, a small amount which may or may not cover expenses incurred not considered recompense for the time and expertise volunteered;
- payment of a stipend or a living allowance, often to international volunteers, to enable the volunteer to meet daily expenses while carrying out their volunteer work, once again not equivalent to that which would be paid an employee for the same time and expertise.

The payment of social security benefits to those involved in the Voluntary Work Initiative has been construed as not constituting payment for voluntary work, and is further discussed in relation to the notion of free-will/voluntarism.
A further tension in the element of reward is present in the organisational setting and free will components of the definitions, that is, the recent employee and corporate volunteering, and this too is discussed later.

Free-will

Another element in Davis Smith's model is "free-will". He offers a definition of free will as being about choice, and voluntarism. This, too, is encompassed in the Volunteering Australia definition above. The concept of "mutual obligation" introduced by the Howard Government brought this element to the forefront of debates in Australia about volunteering definitions because it apparently contradicts the long held view of volunteering as an expression of free-will.

Mutual obligation is a concept associated with the welfare reform of the Howard Federal Government. It has evolved over a number of years but it is said by its proponents to hold that "individuals have responsibilities to the community as well as the other way around" (Abbott, 2000, p. 40) and thus imposes on welfare recipients certain obligations such as "work for the dole" and the Voluntary Work Initiative (VWI). The Voluntary Work Initiative is an option for people on income support, especially those who are unemployed (Cordingley, 2000). These people can do voluntary work without approval from the government agencies involved in unemployment regulation or participate in Centrelink approved voluntary work for 32 hours per fortnight instead of looking for paid employment (Volunteering WA, 2001). The notion of "choice" was retained with VWI because "volunteers" were seen to be able to choose voluntary work amongst a range of options. Opponents and purists argued that often the welfare beneficiaries saw voluntary work as the best of a bad set of choices and thus there was no "choice" or exercise of free will. As identified above the Volunteering Australia definition from 1998 specifically excluded community service orders, work-for-benefit schemes and work experience. The reasoning here is that these activities are not entirely of the person's free will, but are done in order to "fulfil an obligation." (Volunteering Australia, 1998). VWI and mutual obligation incorporated this supposed absence of choice, but volunteering peak bodies and other agencies have taken a pragmatic approach and participated in VWI programmes, including being recipients of funding and operating referral services for VWI participants (see Annual Reports for Volunteering Australia and Volunteering Western Australia).
The introduction of mutual obligation (McClure, 2000) activities such as the Voluntary Work Initiative served to fuel debate about the terminology of volunteering in Australia. Volunteering Australia, and consequently Volunteering Western Australia, were contracted under the VWI initiative to place VWI volunteers in organisations through their Volunteer Referral Service, and this has been a source of funding for their agencies. VWI activities place the definition of volunteering under scrutiny and are a source of tension in efforts to capture the meaning and essence of volunteering. The effect of mutual obligation programmes on volunteering in Australia was not surveyed in the 2000 survey on voluntary work by ABS (2001) and there is limited information on how many "volunteers" are part of this programme. Western Australian research on the barriers to community participation by jobless people has identified a number of concerns for organisations and for the jobless if they are to volunteer, but has also highlighted the valuable skills and experiences brought to organisations by older volunteers involved in the Voluntary Work Initiative (Cockram, 2002, p. 54).

Other examples of tension with the notion of free will include a programme in Western Australia, where the state government has introduced a form of community service into high schools which require all students to have completed 20 hours of service, referred to as volunteering, before they graduate (ALP, 2001; Volunteering WA, 2006). In the US the terms "mandatory volunteering" (Stukas, Snyder & Clary, 1999) and the tongue in cheek "voluntold" (Ellis, 2001) have been coined to refer to volunteering which contains an element of coercion or obligation. The Western Australian study adopted the term "obliged volunteering" to convey a similar meaning (Cockram, 2002).

The idea of "obliged", mandated or compelled "volunteering", where the notion of free will or choice is eroded, can also been seen to be inherent in employee or corporate volunteering. As will be discussed below there are times when the employee may be penalised in terms of career path or other recognition for failing to participate in activity which is implemented or endorsed by the organisation as part of a programme such as corporate citizenship. The essence of the element of free will is challenged when, while the employee is not officially required to participate, there are negative aspects to non-participation, thus instigating a form of compulsion in the choices the employees make (Morrigan & Paull, 2002).
The United Nations Expert Working Group in its deliberations acknowledged that there were "grey areas" which challenged the free will concept:

_The activity should be undertaken voluntarily, according to an individual's own free-will, although there are grey areas here too, such as school community service schemes which encourage, and sometimes require, students to get involved in voluntary work and Food for Work programmes where there is an explicit exchange between community involvement and food assistance (United Nations Expert Working Group, 1999, p. 4)_

The notion of the exercise of free will and the accompanying grey areas serve to muddy the waters about the status of volunteering with more traditional volunteers and "obliged" volunteers coming to their volunteer work with different reasons for volunteering. Reasons for volunteering is canvassed later in this review.

**Organisational setting**

Davis Smith's (1999) conceptual framework referred to organisational setting as a third element in defining volunteering. The Australian Bureau of Statistics for its inaugural survey of voluntary work designated a volunteer as "someone who willingly gave unpaid help, in the form of time, service or skills, through an organisation or group." (ABS, 1996, p. 31). The designation of “through an organisation or group” refers to organisational setting. Such definitions largely exclude what is often referred to as informal volunteering. For example, the Australian Bureau of Statistics in its survey on unpaid work (ABS, 1994, p. 4) excluded:

_work undertaken by an individual or group of individuals acting on their own initiative .... Because [they argue] there is no way of capturing such activity which occurs within and between households._

ABS reports that Statistics Canada has maintained more exclusions than ABS in its appraisal of unpaid work, largely on the basis of the difficulty of distinguishing work from leisure (ABS, 1994, p. 6). In the second National Survey of Giving, Volunteering and Participating in Canada, the approach from the first National Survey in 1997 was continued, and volunteering was considered to be that which was undertaken through a group or organisation (Iall, McKeown & Roberts, 2001, p. 59). Once again not only is there the element of organisational setting, but the concept of work and payment is embedded in this distinction.
Some exceptions to this exclusion of informal volunteering include: *The National Survey on Volunteering* in the UK, which, while making a clear distinction between formal and informal volunteering, does collect data on voluntary activity undertaken “outside of an organisational context and on an individual basis, such as a neighbour helping a neighbour” (Davis Smith, 1998, p. 14); and recent Australian research by Warburton and McLaughlin (2005) which investigated the value of “lots of little kindesses” of older Australians to the development of social capital. Given that the management of volunteers occurs in organisational settings rather than where informal volunteering is taking place, the distinction between formal and informal volunteering is relevant to this research only insofar as the study takes place in formal volunteering settings. It is, however, an important element of the conceptualisation of what constitutes volunteering, and the tensions inherent in clarifying definitions.

Further areas of debate with regard to organisational setting are the more recent concepts of employee and corporate volunteering, already highlighted with reference to reward and free will. The Volunteering Australia standards manual specifies that “volunteer work is based in non-commercial settings” despite recognition of “corporate volunteering” and “employee volunteering” (Wood, 2004), activities which are now promoted as corporate citizenship behaviours (e.g. the Prime Minister’s Community and Business Partnership). Not directly addressed in Davis Smith’s conceptual framework, the involvement of corporations in volunteering or in encouraging (some even requiring) their employees to volunteer adds a further dimension to the complexity of volunteering. In some organisations the involvement of employees in “volunteer” activity is a requirement for promotion while in others the volunteer activity is determined by the company but undertaken in the employee’s time. This crosses over with the notion of free will discussed above, and if undertaken on company time also crosses over with the element of reward and payment. The fact that the activity takes place under the auspices of a commercial enterprise and could be seen to contribute to the official profit making activities of the organisation means that the employee may be receiving a wage or salary while undertaking the work.

Other examples of volunteering which takes place in a commercial setting have arisen from the changing nature of the community sector with facilities such as aged care accommodation and hospitals being operated by commercial providers. Such facilities often operate a volunteer programme. In some circumstances a separate
voluntary association is established to separate the activities of the volunteers from the commercial venture, but the organisational setting in which the volunteering takes place is still based on a for profit model. Interestingly the United Nations Expert Working Group did not include organisational setting as one of its defining characteristics in its final report thus highlighting that this area was already one where change had been accepted (United Nations Expert Working Group, 1999).

**Benefit**

Davis Smith (1999, p. 2) identifies that it is important that “there should be a beneficiary other than (or in addition to) the volunteer” in order to differentiate volunteering from leisure activities. He goes on to discuss the blurred nature of the interpretations of the concept of benefit and postulates that “there needs to be an identifiable beneficiary or group of beneficiaries (which might include the environment or society itself) other than (or in addition to) the volunteer’s immediate family or friends.

The subject of benefit seeks to exclude activities which are to the detriment of society and is generally understood to mean that groups which form which are not for “the common good” would not be seen to be volunteering. This would exclude groups which form for criminal purposes, including terrorist or racist activities. Despite this there are many common elements between passionate voluntary associations or activist groups and groups which form for less “beneficial” purposes (see Saul, 2004 for discussion of a group such as Al Qaeda in this regard). Given that the goals of the organisation are often the determinants of the nature of membership and activities, the determination as to whether the activity is to the benefit of society is one which would differ depending on factors such as one’s view of the issue or purpose for which the organisation is formed. Activism (discussed below) is an area where there may be disagreement about the benefit of the activities of different groups. A specific example of this might be the views of a group whose main activity is to promote and support the timber industry and the views of anti-logging protestors and their organisations.

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1 In some versions of Davis Smith's paper (in particular on the UniteS website) this paragraph is missing from the documentation.
Benefit is also the area where caring, particularly for a family member, becomes a grey area with regard to whether it should be classified as volunteering because the benefit is said to be only to the volunteer’s immediate family. Bittman and Thomson (2000) argue that it is a form of volunteering, and that caring is an altruistic act which is of benefit to the community because it reduces the pressure on the health system to have carers working in the home of the patient. This is in contradiction to Davis Smith’s framework which suggests that the idea of caring for dependent relatives would be ruled out as volunteering.

The United Nations Expert Working Group concluded that “the activity should be of benefit to someone other than the volunteer, or to society at large” (United Nations Expert Working Group, 1999, p. 4) and recognised that volunteers themselves also derive benefit from their volunteer activity.

**Commitment**

Davis Smith (1999) indicates that this element of his framework means that volunteering would usually imply some form of sustained commitment or activity. This element, too, is one which is experiencing some changes in understanding. Episodic and short-term volunteering have been identified as important types of volunteer activity (Dryén, 2006; Maeduff, 1991; Styers, 2004), and volunteer responses in times of disaster or emergency have also been seen to be important types of volunteering, referred to as spontaneous volunteers (e.g. Points of Light Foundation, 2004a; 2004b).

The Volunteering Australia standards also include rights and responsibilities of volunteering, one of which is the right of the volunteer to say “no” when they are unavailable to take on more work, and the responsibility of the volunteer to carry out agreed work on behalf of the organisation. This speaks to the notion of volunteers being unreliable or irresponsible, and in turn to the perceptions of volunteers which lead to lowered expectations and patronising views such as that the individual is “just a volunteer”. It is also directly linked to the concept of free will discussed above, in that the volunteer can exercise free-will in saying “no” to more work. Commitment was the other factor not adopted by the expert group in its published outcomes (United Nations Expert Working Group, 1999).
2.3.3 Seeking a typology

In addition to the conceptual framework outlined above, Davis Smith (1999) proposed a typology of volunteering which identifies how volunteer activity "manifests itself in practice". This four dimensional typology uses the end product or aim to delineate mutual aid or self help; philanthropy or service to others; participation; and advocacy or campaigning as four different outcomes or purposes which can be "clustered under the banner of volunteering". Attempts to separate some of these activities away from volunteering have complicated the interpretations placed on the term.

Wilson (2000) describes differences between volunteering and caring, suggesting that "caring is associated with person-to-person emotional labour on behalf of family and friends' volunteering is thought of as being more formalised and public" (p. 216). In Australia, Bittman and Thomson (2000) describe two continua along which caring can be placed: level of functional dependency and level of formality, suggesting that volunteering and caring can be seen as falling at different points along the continua, but with no clear boundaries between the two.

Similarly, Wilson describes definitional differences between activism and volunteering. He suggests that "conventional wisdom holds that social activists are oriented to social change while volunteers focus more on the amelioration of individual problems" (Markham & Bonjcan 1995 cited in Wilson, 2000), but warns that it can be an artificial construction and not helpful to research to study the two concepts separately.

Kumi Naidoo, former head of CIVICUS: the World Alliance for Citizen Participation, a world-wide organisation promoting civil society and action, has been advocating that we should be working towards "bridging the divide" between the worlds of volunteering and social activism. His argument is that many of those who are working to "change social policy around using social campaigning and social activism...do so on a voluntary basis. So in a sense they are volunteers" (Naidoo, 2001, para 33). Wilson's (2000) example of AIDS crisis volunteers "doubling up as activists" to improve government responses to the AIDS crisis serves to support this view. One of the reasons for attempts to separate volunteering from other activities such as activism may be associated with the image of volunteering.
There have been other attempts to create a typology of volunteering (e.g. Cnaan & Amrofell, 1994; Cnaan, Handy & Wadsworth, 1996), all of them part of the search for some scholarly way forward and to find a focus for the neo-discipline. The field of volunteering is very difficult to categorise in relation to the types of activity. The typologies simply raise further complexities and fuel debates and discussions about what exactly is volunteering.

2.3.4 Attempting to define the “sector”

To further complicate the picture, comparisons are difficult to make between the various viewpoints taken on the existence and boundaries of a “sector”. Many researchers and commentators have observed that the term sector refers to that which is not the state or the market, that is, the government sector or the profit sector. This results in the definition being somewhat unclear, and referring to what the sector is not rather than what it is (Marshall, 1996). A number of terms are used to refer to this sector. In the UK it usually is referred to as “the voluntary sector” and in the US the terms “independent sector” and “nonprofit sector” are often used. Lyons (2001, p. 9), provides a list of many of the terms in use and some of their definitions, referring specifically to “the third sector” and describing it thus:

The third sector consists of private organisations

that are formed and sustained by groups of people (members) acting voluntarily and without seeking personal profit to provide benefits for others;

that are democratically controlled; and

where any material benefit gained by a member is proportionate to their use of the organisation. (p. 5).

Lyons asserts that his discussion of the third sector is “the first attempt to give it a formal meaning” (p. 9). It could be argued that Kendall and Knapp (1995), and Salamon and Anheier (1993) previously attempted this while applying different names for the sector: voluntary sector and nonprofit sector, respectively. Certainly there have been typologies and frameworks proposed which have attempted to identify “appropriate criteria” to aid in the “description and analysis of a meaningful construct” (Kendall & Knapp, 1995, p. 85). The core criteria discussed by Kendall
and Knapp (p. 85) are “an organisation should be formal, self governing, independent of government, not profit-distributing (and primarily non business) and voluntary.” For statistical purposes party political and purely sacramental (associated with religious observance) organisations are excluded “to parameterise the sector for the purposes of the Johns Hopkins Comparative Nonprofit Sector Project” (p. 92), a project which is attempting cross national comparisons of the sector.

A major difficulty of the sector approach is that the use of the term “sector” in relation to volunteering can result in the misconception that volunteering is restricted to one sector. It is important to a contextual view that a large number of differing terms, models and taxonomies have been proposed on this subject (e.g. Hodgkinson, 1990; James, 1997; Kendall & Knapp, 1995; Marshall, 1996; Salamon & Anheier, 1994; Salamon & Anheier, 1998a; 1998b). Volunteers have roles in trade unions and professional associations and thus the private and public sectors have always had forms of volunteering within their realms. Volunteering can and does take place in the government sector, in the form of corporate and employee volunteering, and in the involvement of volunteers in service delivery and other activities. Corporate and employee volunteering and other forms of partnerships mean that volunteering also takes place in the private sector. Further pursuit of the debate on the existence or otherwise of a sector or sectors is beyond the scope of this thesis. However, due to the lack of agreement discussion will employ the terms “volunteer” and “volunteering” without reference to a sector.

2.3.5 “Measuring” Volunteering

The tensions associated with identifying what volunteering is have manifested themselves in the efforts to “measure” the contribution of volunteers. Given that there are these tensions in the development of a definition of volunteering, and that the boundaries between volunteering and other activities are unclear it is not surprising that attempts to measure volunteering encounter difficulties. These tensions contribute to or rather detract from efforts by the peak bodies to seek recognition for the importance and contribution of volunteers to the economy, and to raise the status of volunteers in society.

In the UK the 1991 survey of voluntary activity used the definition:
any activity which involves spending time, unpaid, doing something which aims to benefit someone (individuals or groups) other than or in addition to a close relative, or to benefit the environment (Lynn & Davis Smith, 1992a, p. 16).

This approach was continued in 1997 (Davis Smith, 1998). The survey questionnaires did not use this definition. Instead they deliberately avoided the terms “voluntary work” and “volunteering” in order to reduce the risk of respondents answering only within their own perceptions of what constitutes volunteering and referred instead to unpaid work and help (Davis Smith, 1998, p. 14).

This pattern of not using the terms volunteer and volunteering in the questions is recommended in the Measuring Volunteering Toolkit released for the International Year of Volunteers by a research team from Independent Sector (a US based organisation) and United Nations Volunteers to promote the accurate measurement and description of volunteering to assist in valuing volunteering (Dingle, Sokolowski, Saxon-Harrold, Davis Smith & Leigh, 2001). The toolkit discusses the problems caused by the ambiguity in the terminology and suggests avoiding use of the terms, recommending instead lists of activities for respondents use, suggesting that:

\[
\text{the decision about whether a particular activity should be regarded as volunteering lies with the user of the survey findings, not with the respondent. (p. 23).}
\]

The toolkit recommends an approach in which the researcher’s interpretation is imposed on the activities reported by the participant (actor). One of the reasons for this is the various cultural and language differences which lead to different interpretations by the actor of the same types of activities. In New Zealand, for example, it has been pointed out that the term “voluntary work” originates from Europe. In the Maori tradition, culture and language there is no direct equivalent to “volunteering” as a term, there being no concept of “other” in the family (whanau), subtribe (hapu), and tribe (iwi), where working together is a part of the belonging to these groups and not chosen or voluntary (Wilson, 2001, p. 35). Similarly, in South Australia, it has been identified that indigenous Australians have similar concepts of community and belonging (Kerr, Savelsberg, Sparrow & Tedmanson, 2001).

Lyons, Wijkstrom and Clary (1998) examined the various approaches taken in four national studies and in four cross-national studies. They concluded that there were a number of variables which were framed differently in each of these studies.
including technical differences such as size of sample, and scope differences such as the informal/formal distinction. More important, and more "fatal", however, were the variations they encountered in "the way the activities that are the object of the study were defined and how the questions designed to elicit the data were framed and put" (p. 48). In contrast Davis Smith's (1999) position is that it is possible to draw a broad framework on which to base discussion, and to recognise the differences across various understandings of terminology.

The measurement of volunteering in Australia has encountered other difficulties which have further complicated the scene. In 1995 the Australian Bureau of Statistics undertook its first national survey of Voluntary Work (ABS, 1996). Work in the subsequent five years included debates about whether volunteering was declining in Australia (Lyons & Fabiansson, 1998) and why this might be so, and evaluations of the nature and type of volunteering taking place (Rosenberg-Russell, 1995). In 2000, however, a follow up survey, based on a much smaller sample and included in a different instrument, revealed some serious inconsistencies with the 1995 data. The 2000 data released in June 2001 was accompanied by a technical note discussing the difficulties which had been encountered with the 1995 data, and included some revised tables based on a reworking of the data from 1995. The result was that although the 1996 publication indicated that one in five Australians had volunteered at some time in the 12 months preceding the data collection (ABS, 1996), the reworked 1995 data indicates that this figure was in fact more likely to be accurate at one in four (ABS, 2001). These results showed what many involved in volunteering suspected – that volunteering was not in decline, and in fact the figures previously released for 1995 were inaccurate. The 2000 data seems to indicate an increase in volunteering in Australia to approximately one in three (ABS, 2001). Although this does not mean that all the work in the intervening five years is wasted, it does cause researchers to call into question some of the conclusions reached and to regard some material as less than useful for future research (e.g. Rosenberg-Russell, 1995).

A recent study by a consortium known as the Giving Australia project has provided some more recent data on volunteering in the context of philanthropy (Giving Australia, 2005). This too indicated that volunteering was not in decline. The Giving Australia findings showed that Australia-wide during 2004, 41% of adult Australians volunteered, for an average of 132 hours, which has been estimated to be
equal to 427,400 full time staff, and conservatively estimated to be worth about $14.6 billion dollars to the Australian economy (Giving Australia, 2005).

In Western Australia, as part of the investment in the International Year of Volunteers, the Department of Premier and Cabinet purchased the West Australian data for the ABS Voluntary Work 2000 survey, and a report was produced to profile the trends and patterns in volunteering in the state (DPC, 2001). Unfortunately, the size of the sample taken by ABS in Western Australia seriously limited the utility of data. The size of this sample meant that much of the Western Australian data, if disaggregated to the level of the Australia-wide data, contained too many cells with a relative standard error in excess of 50% and therefore could not be used. The available data, however, has been the basis for publication of figures by the WA Government's Office of Seniors Interests and Volunteering (OSIV) and is likely to be included in data considered for policy making and funding.

ABS data has been a priority for Volunteering Australia and there has been a significant campaign to have the government recognise the value of good data about volunteering. Efforts to date have been inconsistent but have added sufficient complexity to both offer statistics which begin to account for just how much volunteers contribute to the Australian economy and way of life, while at the same time failing to assist researchers in helping to raise the profile of volunteering. Although volunteering has finally been included on the census for the first time in 2005, thus commencing a process of accounting for the volunteers who identify themselves for the census, many of the difficulties and tensions discussed above will come into play in making the data ambiguous and insufficient. Categorical definitions may be a requirement for certain types of research, but for the purposes of this study it is only necessary to understand the complexities and tensions associated with the field as part of the context in which volunteering research takes place.

2.3.6 Volunteer and public perceptions of volunteering

The tensions and contradictions in trying to classify or define volunteering, and the difficulties associated with measuring or quantifying volunteering and its value to the economy serve to offer contradictions in the societal status of volunteering. Cnaan et al (1996) demonstrated that there was wide variability in what people classified as "volunteering". This was supported by work by Lyons (cited in
Lyons, Wijkström & Clary, 1998). As has already been discussed, one of the factors associated with defining volunteering is whether the individual undertaking a particular activity characterises that activity as volunteering or not. Sometimes this is to do with the cultural and other factors outlined above. Qualitative research in the UK has revealed, however, that volunteers and non-volunteers had differing perceptions on the nature of volunteering. All of the definitions discussed above included giving up time to do work in an unpaid (or relatively unpaid) capacity, but non-volunteers had a perception that volunteers "put themselves out" and suffered some inconvenience, while volunteers saw their activities in a more positive light (Thomas & Finch, 1990, p. 17).

The varied public perception of volunteering is an issue examined in relation to youth volunteering in the UK. The term "volunteering" was found to be not widely liked by young people, and one-third of the participants felt the terms volunteer and volunteering were a "turn off" at least to some extent (Gaskin, 1998). This research ties in with the view that volunteers are often seen by society as "do-gooders" (Irving, 2005) and busybodies, "lady bountiful" (Sheard, 1995) and bored housewives. To counter this, advertising has been developed which attempts to change the image of volunteering, for example, a controversial set of advertisements in Britain which attempted to portray volunteering as sexy by use of images of naked bodies (Capeling-Alakija, 2001); and depictions of surf lifesaving volunteers as heroes in recent advertisements on television (Surf Life Saving Society Australia, 2007). The social construction of volunteering has implications for the status of volunteers and volunteering.

People do not always classify what they do as volunteering, either due to its not fitting the traditional form of volunteering, or in some cases due to its "strong association with charities and the 'stigma' attached" (Gaskin, 1998, p. 40). This may result in their not viewing research in the area as being relevant to them, and declining or deciding not to participate, or leaving out important information. As mentioned previously some UK studies have attempted to alleviate this, by their use of mechanisms to avoid use of the terms volunteer and volunteering, and by leaving the classification of the activity to the researcher.

Lyons (1994, p. 164) suggests that the confusion over meanings of volunteering throughout the field might contribute to the lack of recognition of the
value of the services provided by volunteers to the Australian economy. In Canada a scan of public perceptions of voluntary work found similar views (Husbands, McKechnie & Leslie, 2001). Concern over definition and methods of calculation are compounded by concerns over the classification of volunteer activity as "work" or as "leisure". Part of this concern is perhaps associated with the changing view of the volunteer as active citizen rather than "lady bountiful" (Sheard, 1995). Social scientists (Baldock, 1988) and labour historians have also been examining this view (Oppenheimer, 1998; 2000; 2004; Scott, 1998). Scott (1998) argues that if volunteer activity is classified as work, much of labour history, especially that of women, is yet to be examined. Oppenheimer appears to be a solitary voice attempting to breach this gap.

2.3.7 Implications

The tensions and ongoing debates about definitions associated with volunteering mean that a number of implications arise.

- The field is in a time of transition and growth and the terminology associated with volunteering is not static.
- The measurement of the value of volunteering is difficult and will continue to contribute to inconsistencies which lead to volunteering being undervalued.
- Comparison of the findings of different studies must be undertaken carefully and with an understanding and appreciation of the differing terminology (and accompanying assumptions) which are in place.
- Varied categorisations of activities under the umbrella of volunteering may exclude particular groups who feel that their activity is volunteering, and include activities which others may perceive as falling outside volunteering.

What is more important is that the tensions and contradictions are part of the backdrop against which the current study was conducted. The perceptions of volunteering which include the negative images discussed above contribute to the lack of recognition which is received by volunteers. Further, data collection, particularly in a positivist framework, could be hampered by perceptions of the terms "volunteer" and "volunteering", and by the inconsistencies in definition and measurement. What is important for this study is that operating in other frameworks, such as the interpretivist framework, the actor's own classification of his or her activity is accepted and employed. It is important to recognise that all the actors (volunteers, managers, researchers, funding bodies, beneficiaries of volunteering) will have their
own understanding of the terminology and some development of shared understanding will be required for dialogue. Further, it is important to be aware that the field is fraught with unexamined definitions and assumptions, some of which are replete with political and moral undertones.

To this point the discussion has been about the tensions in the setting in which the current study took place. Now we turn to the specific phenomenon under investigation, managing the performance of older volunteers.

2.4 OLDER VOLUNTEERS

As our population ages and birth rates fall, there has been an increasing interest in recruiting older people to volunteer. With the “baby boomers” reaching retirement age, there is increasing concern about the economy, lifestyle, service delivery and resources available for older people. As older people are encouraged to volunteer, volunteer-involving organisations seek views on how to achieve the best for the organisation and for the volunteer. Earlier research indicated that managers of volunteers held concerns about managing older volunteers, particularly if their performance declines due to age or illness. This section of the review examines the literature on older volunteers, including defining “older volunteers”, examining their participation rates in volunteering and discussing the research on older volunteers. It then goes on to discuss the extant literature on the performance of older volunteers.

2.4.1 Defining “older volunteers” in the literature

It has been suggested that to refer to all volunteers who are over a certain age as senior or older volunteers ignores the differences among older volunteers that demand further disaggregation of this age group. Fischer and Schaffer (1993, p. 6) identify three categories of older volunteer:

- “young-old” — in their immediate post retirement phase of life; “who are recently retired and who are unlikely to be frail or to have serious health deficits” (p. 67);
- “old-old” — those who have settled into retirement; and
- “oldest-old” who have reached the stage of their life where frailty and declining health affect their lives.

The categorisation of “older volunteers” became an emergent question in the current study and the social construction of “older” is further examined in Chapter Six of this thesis.
According to the literature, being “old” often is associated with retirement and eligibility for benefits, either from the state or, more recently, from superannuation funds. The time at which “old age” begins is, however, a socially defined concept. In many pre-industrial countries, and indeed amongst our indigenous population, the life expectancy is less than in Westernised cultures, and thus the status of “elder” is conferred earlier. In Western countries the “young-old” and “old-old” concept emerged in the late 1980s (Hughes, Kroehler & Van der Zanden, 2002).

Chronological age has been the mechanism by which public policy decisions regarding allocation of resources and gathering of data have been determined in Australia. Rules about eligibility to hold a drivers licence (17 years old in Western Australia) and about the requirement for annual eyesight (70 years old) and driving ability tests (75 years old) are determined by age. Association of “old age” with the exit from paid work fails to acknowledge the diversity amongst older people. Policy determination based on chronological age or on exit from paid work ignores that older people are not all the same and that they experience a wide variation in abilities, social needs, skills and ability to learn (OECD - Organisation for Economic Co-operation and Development, 1996).

Fischer and Schaffer (1993, p. 6) warn that “it is misleading to make generalisations about the [emphasis in original] elderly.” The important distinctions between the categories of older volunteers outlined above may relate to:

- “lifecycle effect” (Davis Smith, 1992a, p. 49);
- the “seasons of service” of volunteering (Safrit, Scheer & King, 2000); or
- cohort effect (Rotolo & Wilson, 2004).

Lifecourse effect is a term linked by researchers to barriers to volunteering, and refers to those barriers associated with ageing such as poorer health, reduced mobility, lower income and reduced family and workplace ties. The association of these changes with chronological age is an outcome borne of the experience of many. Davis Smith (1992a) suggests that routes into volunteering via family and workplace ties are more likely to affect those in the “third age” (that is, up to 75 years of age), and poor health and reduced mobility are more likely to affect those in the “fourth age” (that is, 75 years and older). The key here is the concept that these are “more likely” rather than that they are hard and fast categories where these changes take place.
Safrit, Scheer and King (2000) theorise that individuals' volunteering patterns change with age, and are associated with life stages such as when children are young or at the end of work, that is, retirement. Omoto, Snyder and Martino (2000, p. 195) concluded that while volunteering may be "sustained and stable over long periods of time, there may be evolving and shifting motivational agendas". They found empirical support from a short-term longitudinal quantitative study for the proposition that younger adults are motivated more by relationship considerations, while older volunteers are more concerned with "service and societal obligations" (p. 194).

The groupings or categories of older volunteers may also relate to cohort group effect, that is, the differences between "generations" identified by marketers and researchers into consumer behaviour. At this time "cohort effect" seems to have generated more research about the baby boomers than older generations. Baby boomers are said to "want and expect more from their volunteer experience" than older generations of volunteers (Wilson, Steele, Thompson & D’heron, 2001, p. 28). The problem of differentiating between age, cohort and period effect (that is, growing older, birth group or historical period) does not appear to have been explored in relation to volunteer performance and motivation, despite the limited discussion on further disaggregating "older volunteers". This gap in the literature has not been addressed despite some more general research including that by Warburton and Terry (2000) and Onyx and Warburton (2003).

2.4.2 Measuring participation in volunteering by older Australians

Despite the discussion above about the difficulties and outcomes of "measuring" volunteering, one source of evidence about volunteering by older Australians is ABS data. At one level understanding that this data is incomplete makes it less than useful, but as an indicator which is used by governments and funding bodies to account for volunteer activities, figures about participation rates contribute to the overall picture of the importance of volunteering.
Table 2.1: ABS volunteer participation rates

<table>
<thead>
<tr>
<th>Age category</th>
<th>Participation rate (2000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Australians – those 18 and over</td>
<td>32%</td>
</tr>
<tr>
<td>All older Australians – those over 55</td>
<td>25%</td>
</tr>
<tr>
<td>55 to 64</td>
<td>33%</td>
</tr>
<tr>
<td>65 to 74</td>
<td>30%</td>
</tr>
<tr>
<td>75 and over</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: ABS 2001, p. 13

As can be seen from Table 2.1, the available ABS data indicates that in the year to June 2000 about 25% of older Australians (that is, those over 55) participated in some form of voluntary work (ABS, 2001). At first glance this figure is less than the 32% participation rate for all Australians aged 18 and older. It is complicated, however, by the differing participation rates for different age groups. Participation rates for the 55 to 64 and 65 to 74 years age groups are 33% and 30% respectively, with a dramatic decline in the 75 and older age group where the rate drops to 18% (ABS, 2001, p.13).

This data is consistent with the concept from the literature discussed above of further disaggregation of “older volunteers” into smaller age groupings. These participation rates have been found to have increased considerably between 1995 and 2000, particularly for the 55 to 64 years age group and the 65 to 74 years age group with increases of 6.5% and 7.3% respectively. The 75+ years age group increased by only 2.9% (ABS, 2001).

A further source of data – the Australian Institute of Health and Welfare (AIHW) – also provides an indication of the level of volunteering amongst older Australians. AIHW statistics indicate that more than a third of the volunteer hours in formal organisations or groups in Australia are contributed by people aged 55 and older (Australian Institute of Health and Welfare, 2002, p. 16). Older people tend to contribute more hours to their volunteer work so that 24% of the numbers of volunteers are 55 and older, and they contribute 37% of the total hours (Australian Institute of Health and Welfare, 2002, p. 16). The median hours per week contributed by volunteers in the three age groups in the 12 months to June 2000 was less in the period immediately prior to the age for eligibility for superannuation or retirement.
benefits (1.9 hours), than for the period after 65 years of age (2.5 hours), with no significant decline after 75 years of age (2.3 hours) (AIHW, 2002, p. 16). The statistics are an important indicator of the contribution of older volunteers to the economy and to social capital. The difficulties associated with measurement and definition make the use of these statistics complex and limited in their capacity to raise the profile of volunteering.

The types of voluntary work favoured by older people tend to be in fundraising (52%), and administration and management (39%) or committee work (39%), with teaching, instruction or providing information showing the greatest decline in participation between those in the 55 to 64 and those over 65 years age groups (ABS, 2001, p. 29). Table 2.2 (below) shows the participation in volunteer activity by type of activity by age group as a percentage of volunteers. From Table 2.2 it can be seen that while fundraising is fairly consistent in its participation rates, administration and clerical work peaks in the 55 to 64 age group, with teaching, instruction and providing information showing the steepest decline in the 65+ age group.

<table>
<thead>
<tr>
<th>Volunteer activity</th>
<th>55 to 64</th>
<th>65 and over</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration/clerical/recruitment</td>
<td>48.7</td>
<td>38.9</td>
<td>40.8</td>
</tr>
<tr>
<td>Befriending/supportive listening/counselling</td>
<td>29.2</td>
<td>32.1</td>
<td>24.0</td>
</tr>
<tr>
<td>Coaching/refereeing/judging</td>
<td>10.5</td>
<td>*5.8</td>
<td>22.1</td>
</tr>
<tr>
<td>Fundraising/sales</td>
<td>51.8</td>
<td>51.9</td>
<td>56.1</td>
</tr>
<tr>
<td>Management/committee work/co-ordination</td>
<td>49.0</td>
<td>38.9</td>
<td>45.4</td>
</tr>
<tr>
<td>Performing/media production</td>
<td>9.2</td>
<td>9.7</td>
<td>9.9</td>
</tr>
<tr>
<td>Personal care/assistance</td>
<td>15.2</td>
<td>13.9</td>
<td>14.3</td>
</tr>
<tr>
<td>Preparing/serving food</td>
<td>33.7</td>
<td>32.9</td>
<td>35.7</td>
</tr>
<tr>
<td>Repairing/maintenance/gardening</td>
<td>27.4</td>
<td>16.6</td>
<td>25.3</td>
</tr>
<tr>
<td>Teaching/instruction/providing information</td>
<td>41.5</td>
<td>26.1</td>
<td>44.4</td>
</tr>
<tr>
<td>Transporting people/goods</td>
<td>29.3</td>
<td>25.8</td>
<td>26.8</td>
</tr>
<tr>
<td>Other</td>
<td>17.4</td>
<td>12.7</td>
<td>11.3</td>
</tr>
</tbody>
</table>

*ABS advises that this estimate has a relative standard error of between 25% and 50% and should be used with caution.
Volunteers may participate in more than one activity and data was collected for up to three organisations. Therefore figures will not add up to 100%.

Source: ABS, 2001, p. 29, Table 21
Western Australian figures are less disaggregated due to the sample size obtained in WA. This data could only be disaggregated into three age groups with the data in the Department of Premier and Cabinet Western Australia (DPC) report being grouped into 18 to 34, 35 to 54 and 55 and older. In this report it is estimated that the volunteer rate for persons aged 55 and older increased from 23.6% in 1995 to 27.2% in 2000 in Western Australia (Forte & Paull, 2001). The Western Australian companion data produced by ABS offered age groups of 18 to 34, 35 to 64 and 65 and older. Thus, patterns which suggest that volunteer rates decline over 75 years of age cannot be confirmed for Western Australia from the ABS data.

The evidence in the Western Australian data for the 55 and over age group for 2000, is that the highest volunteer activity rate for this age group was in fundraising/sales (52.6%), with the next highest being management/committee work/co-ordination (43.2%). These figures are not markedly different from the Australia-wide data.

The concerns raised above about statistical data and the definitions and assumptions on which these are based make this data useful only as an indicator. As it is likely that the nature and extent of volunteering in Australia is not adequately captured by the survey research, the fact that these are relied on by policy makers, funding bodies and the broader community contributes to volunteering being undervalued, and therefore the status of volunteering being contradictory and ambiguous. This is important to the social construction of volunteering as discussed in the findings of this research. The current study provides evidence on the relationship between the status of volunteering and the management of volunteers which shows a link between volunteering being undervalued and the resources provided for management.

2.5 OLDER WORKERS IN PAID EMPLOYMENT

In canvassing the extant literature on older volunteers it was also necessary to consider the work on older workers in paid employment. The concept of “older workers” includes a variety of definitions with some employers regarding older workers as being as young as 45 (Arteraf, 1989 cited in Ence, 1998). The Australian Bureau of Statistics defines older or mature workers as being those in the age range of 45 to the age of eligibility for social security benefits, while the Australian Council of
Ageing refers to 45 to 64 year olds as mature aged workers, and the 65 and older age group as older workers. Thus, as with the work on older volunteers, the research about performance of older workers refers to a range of different age groups.

2.5.1 Retirement age of paid workers

Calls for older Australians to remain in paid employment have increased in recent times (Ferrier, 2005). It was only in 1995 that compulsory retirement ages were removed from the Western Australian statutes, with amendments to the Equal Opportunity legislation to include age as grounds for a complaint of unlawful discrimination. Further, the effects of the legislation are not yet being felt by organisations to any degree, with many workers opting to retire at or about 65 years of age when they are eligible to take up superannuation or pension schemes. Labour force statistics indicate that in 2001, 61% of people aged 55 to 59 were participating in the paid workforce, 36% of those aged 60 to 64 and only 6.5% of those over 65 years of age being in paid employment (AIHW, 2002, p. 14). On the basis of these figures, managers in the paid workforce are unlikely to have encountered large numbers of employees over 60 years of age, and will not have experience in managing those over 75 years of age, the group referred to in British research as “the fourth age”. Therefore, it is argued that the management literature on ageing workers has not yet examined some of the issues raised by this study, especially in the light of the evidence relating to decline and dependency being most likely to occur in this fourth age.

2.6 MANAGING VOLUNTEERS

The quality of the work done by volunteers matters. There are a number of reasons that organisations need to ensure that their volunteers are meeting the expectations of the client and the organisation. For some programmes it is the reputation of the organisation, its credibility and survival which might be at stake. In others it may be the lives of others (Fischer & Schaffer, 1993). The management of volunteers is receiving increasing attention in volunteer-involving organisations. There are a number of reasons for this, including:

- increased demands for excellence in service delivery from clients and beneficiaries of volunteer effort;
• increasing levels of risk management requirements stipulated by insurance providers;
• increasing concerns about financial and fiduciary responsibility of non-profit boards and management committees; and
• increasing expectations from volunteers themselves that their work will be well organised and their time well spent.

These pressures have been met by the gradual adoption of management techniques in volunteer-involving organisations. Some commentators have been opposed to this process (e.g. Darcy, 2002), but generally the adoption of a management approach has been accepted.

Three key areas of volunteer management have been identified as important to this discussion:

1. How does managing volunteers differ from managing paid staff? This is a question which has been hotly debated at times. There seems to be an emerging consensus that there are significant differences which cannot be ignored, while at the same time agreement that there is benefit in adopting and adapting processes and ideas from mainstream management literature.

2. The motivation of volunteers: Motivation of volunteers has been an extensively researched topic, which has resulted in the development of tools for recruitment and retention of volunteers who are not tied to their organisations by contracts or by the need to earn a living, thus able to exercise their free will if they are unhappy.

3. Managing volunteer performance: With the increasing demands placed on organisations to provide excellent service delivery and meet the demands of insurers, clients and others, managing the performance of volunteers has become an area for concern amongst managers of volunteers.

Each of these areas will now be examined in more detail with specific attention paid to the extant literature on older volunteers.

2.6.1 Managing paid and unpaid workers

Managing volunteers is said to be more difficult than managing paid staff (Hedley, 1992). This is so because of a complex set of relationships within organisations that makes the volunteer simultaneously a service delivery agent, a client and a volunteer. This results in a “special” status for volunteers which is complicated by the expectations of volunteers that their work will be well structured, well organised and appreciated (Farmer & Fedor, 1999). Whereas past debate has focussed on whether or not volunteers should be managed at all, more recent
discussion has been on applying management theory to volunteer management. Dartington, for example, (1992) embraced the application of management theory but cautions that, in welcoming it, volunteers and those who “manage” them need to ensure that they do not lose those qualities which make volunteering “special”.

Research has identified that there are unique elements to volunteering which make managing volunteers as if they were employees both impractical and unwise (Paul, 2000). These might include: excessive paperwork and administrative tasks which take the volunteers away from the task or purpose for which they volunteered; and excessive control over volunteer activities which make the volunteer feel their efforts are not appreciated (Vanstien, 1999).

Some authors (Drucker, 1989; Geber, 1991) have suggested that some volunteer-involving organisations, in the US in particular, are examples for business due to their excellent people management skills. Drucker (1989, pp. 89, 91) states that these organisations “have learned that [they] need management even more than business does, precisely because they lack the discipline of the bottom line”, and that “volunteers must get far greater satisfaction from their accomplishments and make a greater contribution precisely because they do not get a paycheck”. Drucker (1990, p. 181) also argues that “in no area are the differences greater between businesses and non-profit institutions than in managing people and relationships”. According to Drucker, the management of the people and the relationships in an organisation which has both paid staff and unpaid staff puts greater pressure on the manager to apply good management practices. Researchers investigating the management of volunteers cannot afford to ignore the literature on the management of paid staff. At the same time they should expect to find elements particular to the management of volunteers, which recognise their volunteer status. The set of expectations volunteers bring to the organisation is made more complicated by the many and varied reasons they have for undertaking volunteer activity.

2.6.2 Motivation

One area where the volunteer literature is notably different to the literature on managing paid employees is in the area of motivation. Usually in the paid workforce the emphasis is on increasing performance and job satisfaction for workers in order to achieve organisational goals. In volunteering research the emphasis is on recruiting
and retaining volunteers and tends to fall into two categories - the reasons for volunteering in the first place, and the reasons for continuing to volunteer. These differences are reflective of and in turn contribute to the social construction of volunteering and the management of volunteers.

Motivation is one of the most researched topics in the volunteering literature. In the search for recruitment ideas, and for ways and means of retaining volunteers, researchers have concluded that there are many reasons for volunteering (Clary, Snyder & Ridge, 1992; Clary et al., 1998; Clary, Snyder, Ridge, Miene & Haugen, 1994; Cnaan & Goldberg-Glen, 1991; Pearce, 1987; Perrino, 1998), and that these change over time (Covling, 2001). The theories developed about volunteering motivations range from altruistic and egoistic motives to normative and prescriptive motives. The debate as to whether the decision to volunteer is altruistic or egoistic can be traced back over thirty years, with studies in the 1970s concentrating on what might be termed the “altruism vs. egoism” debate.

Fitch (1987, p. 425) suggests that motivations for volunteering can be divided into three categories:

1. altruistic, “with a goal of increasing others’ welfare” (p. 245);
2. egoistic, “with a goal of increasing the helper’s welfare” (p. 245); and
3. social obligation, “with a goal of repaying a debt to society” (p. 245).

Perusal of the literature indicates that two more categories can be added to this:

4. normative – out of a sense of duty or because it is expected by the community or social group within which one lives (see, for example, Warburton & Terry, 2000); and
5. “prescriptive” – where the “voluntary” activity is mandated in some way, either explicitly in the case of what has been referred to as mandatory volunteering, or implicitly as a result of a policy or approach in a particular setting.

As has been discussed, these reasons for volunteering may remove the activity from within the realms of the definition of volunteering by removing the notion of free-will (discussed above).

One of the most cited instruments for the measurement of volunteer motivations is the Volunteer Functions Inventory (VFI) (Clary, Snyder & Ridge 1992; Clary, Snyder, Ridge, Copeland, Stukas, Haugen, et al, 1998). which is the basis for ongoing research into the motivation of volunteers, including here in Australia.
Developed in a psychology setting this tool is positivist in its approach, and relies on questionnaires and statistics to develop its conclusions. Other studies have tested competing models (e.g. Okun, Barr & Herzog, 1998). The adoption of such tools as the VFI is not universal, and many of the studies have used different categories, or included different reasons for volunteering into these categories. One example of this is the desire to help others, which can be seen as altruistic (that is, selfless or egoistic) in that volunteers desire to feel good about themselves for what they do. Such a motive may also be seen to come from a sense of social obligation, to be normative or seen to be expected or prescribed in some way as part of a larger activity such as membership to a particular group.

**Older volunteers seek social contact and worthwhile contributions**

Older volunteers have been found to indicate different reasons for volunteering to the rest of the population. ABS data (Table 2.3) indicates they are less likely to cite reasons of personal involvement and learning new skills than are younger volunteers, and more likely to cite reasons including social contact, helping others or the community, doing something worthwhile. For example, volunteers in the 35 to 54 year old age group cited personal/family involvement (40%) more than their older counterparts (16.7%), and older people are more likely to cite social contact than younger volunteers (34.1% as compared to 22.9%) (DPC, 2001, Table 7).
Table 2.3: Reasons for volunteering, Australia and Western Australia

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18-34 yrs</td>
<td>35-54 yrs</td>
</tr>
<tr>
<td>Help others/community</td>
<td>41.5%</td>
<td>46.9%</td>
</tr>
<tr>
<td>Personal satisfaction</td>
<td>39.0%</td>
<td>41.8%</td>
</tr>
<tr>
<td>Personal/family involvement</td>
<td>29.4%</td>
<td>40.0%</td>
</tr>
<tr>
<td>To do something worthwhile</td>
<td>25.8%</td>
<td>29.4%</td>
</tr>
<tr>
<td>Use skills/experience</td>
<td>13.7%</td>
<td>12.3%</td>
</tr>
<tr>
<td>Social contact</td>
<td>14.0%</td>
<td>17.7%</td>
</tr>
<tr>
<td>Total (a)</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

*Estimate has a relative standard error of between 25% and 50% and should be used with caution.
(a) Includes all other reasons. Volunteers may give more than one reason, therefore, figures for individual categories will not add to 100%.

The ABS data is consistent with many of the theories developed about the involvement of older people in volunteering. Most of these have been developed in ageing research in other contexts, but can be used to explain and understand the motivation to volunteer in older people. They include: activity theory, continuity theory and role loss theory. Most of these theories come from psychology and have been researched in a positivist paradigm, and in many cases have not sought to examine the activity in-depth from the perspective of the volunteer.

Activity theory suggests that remaining active in later life assists with remaining healthy and enables better adaptation to the ageing process (Van Willigen, 2000). The findings of a small scale quantitative study conducted in Adelaide suggested that in Australia, as in other countries, volunteering can provide benefits to older adults in terms of identity, self-esteem, belonging and competence needs and can thus contribute to psychological wellbeing (Battaglia & Metzer, 2000). Such
findings lead to recruitment campaigns promoting healthy lifestyle activities, and may also be a factor in encouraging older volunteers to continue their volunteer activity.

Atchley’s continuity theory of ageing says that “middle aged and older adults attempt to preserve and maintain existing structure...and prefer to accomplish this by using continuity, that is, applying familiar strategies in familiar arenas of life” (cited in Kim & Feldman, 2000, p. 1195). This theory is supported by the evidence which suggests that those who volunteer in middle life are more likely to volunteer in later life (Fischer & Schaffer, 1993; Forster, 1997).

Role loss theory suggests that older people may take up volunteering as a substitute for work to compensate in some way for their loss of role, status or identity. A study of older volunteers in Australia by Warburton and her fellow researchers concluded, amongst other things, that older people are motivated to volunteer not just because of their internal belief systems, but also because “they feel that those close to them support and approve of them volunteering...and because those around them were also volunteering” (Warburton & Terry, 2000, p. 256).

Not all older people volunteer. Disengagement theory states that some older people look to retirement as a time to “disengage” from the pace of life, and thus to withdraw. Davis Smith suggests knowledge of this theory can remind us that some older people do look to this aspect of retirement and prefer not to volunteer (a, 1992, p. 48). It is also possible that some who choose to disengage from their previous lifestyle may choose to volunteer as a leisure activity (Henderson, 1984).

Life cycle transition and lifestage effect are further theories related to ageing translated to the volunteering context. Kincade et al. (1996, p. 481) found that “being very old (85 and older) is associated with a reduction in the odds of performing volunteer work”. This finding is consistent with the concept of declining capabilities associated with age having an impact on volunteering. Davis Smith (1992a, p. 49) found that in the third age (50 to 74) the health factors associated with ageing were not likely to have a profound effect on ability to volunteer, but observed that “poor health caused by advancing years ... is likely to be far more of a block to people in the fourth age [75 and over].” As was discussed earlier, however, the different reasons for volunteering may also be associated not only with age, but also with birth cohort or period effect.
To categorise the motives of the individual to volunteer can obscure the fact that people usually have more than one reason for volunteering, and that their reasons for volunteering change over time. Volunteers are knowledgeable and active and exercise free will. They make their choices to volunteer and to continue to volunteer based on a range of issues, and when they are unhappy they are able to exercise free will and leave their volunteer position. The choices they make are likely to be dependent on their understanding of their own situation and their ability to make sense of and take part in the situation in which they volunteer. Despite this, understanding the reasons people choose to volunteer, and choose to continue to volunteer is likely to be influential in the management of the performance of volunteers even though the focus of such research is usually on attracting and retaining volunteers in the organisation.

2.6.3 Managing volunteer performance

The pressure on managers of volunteers to ensure that volunteer performance meets the demands of clients, insurers, regulators and the community has meant that there is an increasing focus on the performance of volunteers (Leonard, Onyx & Hayward-Brown, 2005).

There is a large amount of prescriptive literature aimed at the manager of volunteers outlining the "How to" of managing volunteer performance. Examples of this are: sections in handbooks or manuals (Curtis & Noble, 1993; Davies, 1989; Fisher & Cole, 1993; Kupke, 1991; MacGregor, James, Gerrand & Carter, 1982); and specific resources concentrating on one aspect of performance management for a ready reference or guide (MacKenzie, 1988; Vineyard, 1989).

The advice to managers and voluntary organisations in the prescriptive publications examines issues such as: training; handling "difficult volunteers"; motivation, rewards and recognition; and feedback and appraisal (Adironack, 1989; Curtis & Noble, 1993; Davies, 1989; MacKenzie, 1988; Vineyard, 1989). The advice to managers seems to be that "Regular or long term volunteers should have the same opportunities for supervision and support as paid staff," with adaptation of the process to suit voluntary status (Adironack, 1989, p. 68). Many authors argue that rewards, recognition and clear expectations contribute to good performance for staff and volunteers.
Some authors suggest that organisations are reluctant to provide monitoring and feedback to volunteers on performance, and sometimes fail to do so at all (e.g. Allen, 1987; McCurley, 2004; Noble, 1991; Penn, 1990). MacKenzie (1988, p. 11) argues that "volunteers urgently need the 'guideposts' that ongoing assessment provides." This may be in part due to the perception of the volunteer effort as a gift, or the exercise of free will. Penn (1990, p. 39) states that "A person who volunteers and does not perform as expected should be replaced by another person who will do the job satisfactorily." This presupposes that there is another person available to volunteer. Pinder (1985) points out that it is still a matter of personal motivation and individual choice that determines performance of volunteers. It is, therefore, the responsibility of the organisation to identify the key motivators of its volunteers and to offer recognition and support appropriate to the volunteers themselves (Vineyard, 1988). Failure to perform can have serious consequences for the organisation. There may be occasions when dismissal is warranted. However, the literature suggests there is some level of reluctance to dismiss volunteers (e.g. Baldock, 1990; MacKenzie, 1988). Allen (1987) discusses the role of the agency as "grateful recipient" in the volunteer/agency relationship. Penn (1990) talks of the detrimental effects including demotivation of other volunteers if problem volunteers are not dismissed. MacKenzie (1988) observes that dismissal of the volunteer may be the only alternative, either in the face of repeated problems or if a fundamental element of the job (e.g. confidentiality) has been breached.

The empirical research on the management of volunteer performance has largely originated in Great Britain and North America, where the interest in volunteers and volunteering from academics is of much longer standing than in Australia.

Studies relating to performance management of volunteers have been conducted into:

- determinants of turnover (Miller, Powell & Seltzer, 1990);
- volunteer roles in specific organisations (Hoad, 1991);
- the relationship between motives and incentives and attitudes and performance (Puffer & Meindl, 1992);
- the relationship of motives to longevity of participation by volunteers (Rubin & Thorelli, 1984);
• volunteer interpretation of regulative messages about performance (Adams & Shepherd, 1996);

• commitment to the organisation (Brown & Zahrly, 1990; Cuskelly, 1998; Dailey, 1986; Keyton, Wilson & Geiger, 1990; Reich, 2000; Torres, Zey & McIntosh, 1991); and

• expectations, identity, experiences and performance (Grube & Piliavin, 2000; Ilsley, 1990).

Although all of these provide some insight into the management of the performance of volunteers, most are overseas studies (with the exception of Cuskelly). Thus, they do not account for cultural and social differences which may apply in Australia.

Research relating to paid employees has found that cultural differences do apply in relation to performance attribution. Australian supervisors were found to be more likely to attribute performance to effort than ability and to be less likely to use extrinsic rewards and punishment (Ashkanasy, 1997). With specific reference to feedback, Americans were found to be more trusting of feedback received from their supervisors than their English counterparts (Earley, 1986). It is, therefore, unwise to assume that findings even from the US, Canada and Britain will apply to volunteers in Australia.

Australian research into the management of volunteers is limited. Recent research, however, has highlighted some varied management styles which are relevant to the findings of this research. Leonard, Onyx and Hayward-Brown (2004, pp. 212-13) conducted a qualitative study in New South Wales seeking in-depth understanding of the perspectives of women volunteers on management and comparing them with those of their co-ordinators. They identified three “coordination styles – horizontal, nurturing and managerial”.

The style termed “managerial” by Leonard et al (2004) is described as having

*a major concern with efficiency and effectiveness where they are defined in terms for managerial processes rather than a personalized concern with specific outcomes for specific clients ... there was a strong emphasis on development of formal policy and procedures and strict supervision of volunteers by paid staff to make sure they follow correct procedures.* (p. 213)
Further, it was reported that "co-ordinators did not want volunteers 'to get the idea that they are virtually as good as or better than paid staff'" and evidence was provided of the "managerial style" being marked by manageralist terminology.

Leonard et al (2004) describe those they have termed nurturers as "good mothers" to the volunteers:

Co-ordinators using the nurturing style encourage close relationships and good communication, including conflict resolution and mediation. They are conscious of their volunteers needs, offering debriefing or counseling. (p. 213).

Leonard, Onyx and Hayward-Brown (2004) have adopted the term "horizontal" for the style which is characterised as having open communication, flexibility, decision making and autonomy, self direction and mutual empowerment amongst volunteers. They comment on the lack of hierarchy in the relationship and on the reciprocity in the relationship. In this style the co-ordinator is seen to be "working at the grassroots level with volunteers" (p. 212).

Leonard, Onyx and Hayward-Brown provide a grid which compares these three styles of management across a range of factors including flexibility, and also offers some insights about the responses of the volunteers in the study. This study is considered further in Chapter Six of this thesis as it relates to the data categories generated in data analysis.

2.7 MANAGING OLDER VOLUNTEERS

2.7.1 The contribution of older volunteers

The evidence in the literature is that volunteer managers report that older volunteers serve longer, give more hours and are more reliable than their younger counterparts (Miller et al, 1990). Although there are Australian studies that focus on other aspects of older volunteers (e.g. Baldock, 1998; 2000; Black, 1999; Brunskill & Ellis, 1994; Fogg, 1999; Warburton et al., 1998; 2000; Watson, 2000) only one published Australian study with data on the topic of performance has been encountered (Williams, 1995). This survey-based study, conducted in South Australia, examined volunteering by people aged 50 and over from an organisational perspective. The performance of older volunteers was not specifically surveyed, however, the advantages and disadvantages of involving older volunteers was
canvassed in a free response format. Respondents indicated that the benefits of involving volunteers aged 50 and over included experience (96 organisations 30%); reliability (82; 26%); loyalty or commitment (63; 20%) time (55; 17.5%). Other responses included "maturity", "knowledge", "multiskilled" and "empathy". Only four organisations (or .01%) indicated no benefit in involving older volunteers (Williams, 1995). This Australian data is consistent with findings about older workers, and is discussed below.

2.7.2 “Declining performance” in “older volunteers”

The literature confirms that managers do have concerns about changes in performance that are seen to be related to age in volunteers. Salmon (1985) identified as early as 1979 that managers were anxious about involving older volunteers. There is limited research, however, which examines the performance of older volunteers, and none has been identified which delves into the individual perspectives of the volunteers and managers on the subject of declining performance.

At an Australian level only the South Australian study (referred to above) appears to have data on the topic of declining performance due to age (Williams, 1995). In that study respondent managers were asked to indicate “the main disadvantages they had found in involving people aged 50 and over as volunteers in their organisation” in a free response format (Williams, 1995, p. 31). Williams reported that there were 313 survey respondents. Of these 117 (or 37%) indicated that they experienced no major disadvantages in involving volunteers over 50 years of age. Of those who expressed concerns, 61 (19%), however, reported concerns about “lack of physical strength/ill health/being unfit” (p. 32); and 47 (15%) were concerned about “slowness to respond to new ideas/resistance to technology” (p. 32). Other concerns included “intolerance, being judgemental, being out-of-touch or overly talkative” (p. 32), and “tendency to move to warmer climate for much of the winter! [emphasis in original]” (p. 33).

The extant literature indicates that in involving older volunteers in their organisation managers are faced with some of the issues associated with the ageing process. Older people are more likely to have health and functional problems than younger people. There is evidence that those in the 70+ age group are at greater risk of frailty, failing health, diminished eyesight, slower reaction times and reduced
Cook (1992) suggests that co-ordinators and managers of volunteers must "face reality when service is no longer possible", and deal with the matter with as much tact and dignity as can be mustered.

Fischer and Schaffer (1993) report anecdotal evidence of the volunteer whose reading on to tapes for the disabled is wiped without his knowledge, and the driver who was "fired" due to her poor driving. These anecdotes are part of the identification by Fischer and Schaffer of the tension between the quality control and compassion that was the dilemma raised by managers as the catalyst for this study.

Forster (1997) suggests that commitment to the task, the organisation or the people were reasons people found letting go of their volunteer activity difficult. She (1997, p. 46) showed that "a strong attachment to the organisation can make retirement from the organisation hard." Volunteers, despite declining health, may find that letting go of something which is important to them is extremely difficult, and staff can find the "resistance and anger they sometimes encounter" (p. 90) taxing. Strong commitment to the people within the organisation, other volunteers and paid staff can make letting go or retiring even more difficult (p. 90).

Forster (1997) confirms that managing poor or declining performance by a volunteer, already a difficult job, is more difficult with older volunteers: "The fact that the volunteers were older people made the position even more uncomfortable" (1997, p. 70). While suggesting that there is evidence that more direct and open communication of difficulties with volunteers may work, Forster also acknowledges that "perhaps the most difficult and sensitive situations staff encountered were when performance had declined seriously due to ill health or ageing and the volunteer appeared unaware." (p. 72). This situation is consistent with some of the data discussed in Chapter Six.

Fischer and Schaffer (1993) suggest that volunteer-involving organisations experience "ageing in place" of their volunteers, a concept from the literature on housing and accommodation for older people where as the residents age they increasingly need assistance and support to stay in their current lodgings as they become frail. The dilemma for volunteer-involving organisations often involves decisions about who is the client and the difficulties associated with diverting resources to assist the volunteer rather than the client.
Warburton and Terry’s (2000) findings about the reasons older people choose to volunteer may also provide an insight into the choices made by volunteers about continuing to volunteer discussed above. Volunteers may volunteer beyond the point where they feel capable, not just because of the commitment they feel to the organisation, the task or the people, but also because of the subjective and behavioural norms identified.

As has already been discussed in Chapter One, previous research carried out for my Master of Business (HRM) was specifically related to managing the performance of volunteers. In a quantitative foundation study which examined human resource management systems in volunteer-involving organisations in Western Australia, it became apparent that there was significant variation in the nature, type and extent of performance management systems in place (Pauull, 2000). In the central study which examined the use of feedback to manage poor or declining performance several key themes relevant to the current study emerged:

- Volunteers do like to know how well they are performing and specific feedback which offers guidance as to how to improve performance is appreciated by most.
- More important than the feedback, however, is the culture and climate in which the volunteers are working. Where the culture and climate is one in which the volunteers feel appreciated and valued, and the communication is considered to be good, volunteers and managers feel more comfortable about giving and receiving feedback about performance.
- Managers had concerns about managing the performance of some older volunteers whose performance they believed to be declining. This was not central to the study and was not pursued in any detail.
- It was evident that the quantitative data alone was insufficient for the exploration of the topic, and the use of in-depth interviews and discussion groups provided perspectives and insights which were not obtained from the quantitative data collection process.

That study also highlighted the interest that many managers of volunteers have in their volunteers and the quality of management they seek to offer to their volunteers and their organisations. The people from whom the research problem arose expressed emotional involvement in the management of older volunteers. Their search for understanding of the perceived problem came from the organisational demands for volunteer performance, and from the clash with their values when they perceived that an older volunteer was no longer able to perform their volunteer work as the organisation might demand.
2.7.3 Performance of older workers

The evidence from the paid workforce is that there is not necessarily a correlation between increasing chronological age and declining performance. A widely cited study by Czaja (1995) concluded that there was limited evidence about the relationship between ageing and work performance. Generally, what research does exist indicates that age and job performance are generally unrelated (McEvoy & Cascio, 1989). Nevertheless, there is evidence that a number of changes in capacity may be associated with ageing. Physical changes include changes in vision, strength, mobility, anthropometry (body dimensions), health and rehabilitation (Sterns, Stems & Hollis, 1996). Intellectual capacity has been found to be stable well beyond 70 years of age. However, information processing speed and efficiency may be affected, although not to a degree which has been found to affect most older adult workers (Stems et al, 1996). Older adults have been found to learn as well as their younger counterparts, albeit at a lesser speed (Stems et al, 1996). Other changes include changes in hearing, perceptual speed, motor speed and reaction time, creativity and idea productivity, memory, problem solving and decision making, and cognitive task performance. Despite the findings from laboratory performance, there is evidence which shows that older adults "are still capable of maintaining a good level of work-related performance in the workplace" (Stems et al., 1996, p. 289). This apparent contradiction is examined by Stems et al who conclude that "there may be no significant age-related decline for some individuals across most of their adult life span" and limited evidence as to how the declines which do occur affect performance at work. Further, they conclude that there is a need for more research on how ergonomic intervention may reduce the impact of decline in the workplace.

2.7.4 Age discrimination in volunteering

Age discrimination in volunteering has emerged from a number of studies. Hutchinson (1999, p. 72), for example, found that there were some managers working with older volunteers who were making "assumptions about what older people are interested in and are able to do" which served as barriers to their participation. It might be speculated that such assumptions would also contribute to the nature and type of work allocated to volunteers, and about performance of tasks, a matter discussed in relation to the findings of the current study. Fischer and Schaffer (1993,
p.129) report that in some organisations jobs saved for volunteers are neither interesting nor challenging, especially those jobs saved for older volunteers. This could be a product of the view that volunteers are “incompetent amateurs” or “just volunteers” as well as assumptions about the capabilities of older people to undertake the tasks. In the United Kingdom, the Institute for Volunteering Research (n.d.) found direct discrimination in some places arising from, for example, insurance requirements. The issue of age discrimination has also been researched in relation to paid workers.

2.7.5 Myths and stereotypes

When it comes to age and ageing the collective understandings we have developed in society about what ageing does to the human body, and the changes ageing wreaks on capabilities are the source of myths and stereotypes as well as accurate assessments of the physical, cognitive and social role changes which are faced by humans as they age.

*The medical model of ageing focuses on declines in body and mind and has had a strong influence on general expectations and fears about the later years of life. Loss of physical and mental abilities with the associated loss of personal independence is frightening, yet, for most people this outcome is far from reality.* (National Seniors Productive Ageing Centre, 2005, n.p.).

Medicine is also responsible for extending the life expectancy of human beings and so the “old” in our society in 2007 are older than those who were “old” in previous centuries. Generally, the way we perceive “old” and “the elderly” varies across cultures and societies and the way that “the elderly” are treated in society is often a reflection of the status held by older people in that society. In the Western world those who have reached retirement age have been of lesser status than those in the workforce, a reflection of the status of paid employment in society, and of the importance of productive contributions from members of society.

Despite the inconclusive evidence about the decline of work-related performance, there are many myths and stereotypes applied to older workers (Steinberg, Walley, Tynan & Donald, 1998). Negative stereotypes about the contribution of mental and physical decline in older workers to their productivity are said to contribute to the attitudes of some employers towards older workers in
Australia. Research in the United States and in Britain found favourable attitudes towards older workers, but Australian research seems to show that Australian managers are critical of older workers for their inflexibility and complacency, ill health and unwillingness to retrain (Encel, 1998). Encel argues that the Australian results are strongly influenced by stereotyping, suggesting that "stereotypes based on ignorance were clearly in evidence" (p. 49).

Not all employers have a negative image of older workers. A study conducted for the Department of Employment and Training at the end of the 1980s found some positive attitudes towards older workers including:

- better developed skills and experience;
- stability in the job;
- ability to take, understand and carry out orders; and

Conversely, the same study found a reluctance to employ older workers for reasons including ignorance of the laws on retirement ages, and on the numbers of older workers seeking employment (Artcraft, 1989 cited in Encel 1998, p. 48).

A recent study in the United Kingdom found evidence that negative stereotypes about older employees influenced not only employability, but also opportunities for advancement and development (Taylor & Walker, 1998a). Taylor and Walker (1998b, p. 643) also advanced the notion that the construction of age in the workplace is very complex and requires further case study investigation "taking into account the perspectives of all the various actors". Further research which investigated this found that younger workers may have incorrect impressions of older workers, considering them to be less physically capable, less creative, resistant to change and unable to learn new things, but that these younger workers' beliefs can be diminished by direct experience with older workers (Hassell & Perrewe, 1995). There is quite a bit of research which indicates that there is a pervasive stereotype in the workplace which categorises older employees as less effective than younger employees (e.g. Avolio & Barrett, 1987). The evidence is strong, however, that these stereotypes are not malicious or based on the emotions associated with prejudice, and that older workers are at least as competent as younger workers (Cuddy, Norton & Fiske, 2005). The social construction of age is a powerful influential factor in the
judgements made about older people. The older people themselves often find that the behaviour of others towards them alters based on the fact that their appearance alters as they age.

People often say you’re as young as you feel. They are, perhaps, trying to bridge the mysterious gulf between their own constant idea of who they are and other people’s changed behaviour towards them. To be elderly is to lead a double life, to be a kind of secret agent, an emissary of the time to come, a spy from another world: the rooted self that is unchanging coexists with the social mask of the aged person to which others increasingly respond. (Seabrook, 2003, p. 15).

This is likely to be an important factor in the judgements made by managers and supervisors on the performance of their subordinates, a topic which is highlighted by the findings of the current study.

2.8 MANAGING DIFFERENCE

Kramar (1998, p. 121) suggests that “the development and implementation of the concept of diversity management will facilitate the effective management of an ageing workforce”. More than equity or equal employment opportunity, she argues, it is an approach “which acknowledges the need to manage similarities and differences between the contributors to the organisation”.

Approaches to managing difference appear to come from a number of theoretical perspectives: Equality, based on “sameness”, and diversity management based on “difference” are two of the mainstream perspectives. The former is the basis for much of the legislation in Australia, where employees should be judged independently of personal characteristics such as age, gender or race, and the focus should be on job related characteristics and merit. Even affirmative action policies which seek to have disadvantaged minorities more equally represented in the workforce are based on this approach, as it is equality of outcome which is being sought. The latter, diversity management, is based on bringing difference into the workplace, and is often based on the business case, where it is seen that such difference can bring with it a competitive edge (Gagnon & Cornelius, 2000).

A more recent approach to managing difference has been termed the “capabilities framework”. It is used by the United Nations as a part of their index for quality of life, the United Nations Human Development Index. Gagnon and Cornelius
(2000) propose that the work of Nussbaum and Sen in applying ethical theory to the case of workplace equality provides a "fundamentally different approach to the understanding of equality and inequality". The core of the capabilities approach is "the inclusion of all members of a community or society, and that they are fully equipped to share in the fundamental entitlement of that society and lead the lives they would wish to lead" (Gagnon & Cornelius, 2000, p. 72).

Kramar (1998) citing Thomas, lists eight responses to diversity, presented in Table 2.4.

Table 2.4: Eight responses to diversity

<table>
<thead>
<tr>
<th>Exclude</th>
<th>Keep out diverse groups or expel them</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deny</td>
<td>Ignore diversity dimensions</td>
</tr>
<tr>
<td>Suppress</td>
<td>Individuals encouraged not to express their difference</td>
</tr>
<tr>
<td>Segregate</td>
<td>Cluster groups into certain areas</td>
</tr>
<tr>
<td>Assimilate</td>
<td>Attempt to alter those with differences to be like the dominant group</td>
</tr>
<tr>
<td>Tolerate</td>
<td>Acknowledge the right for difference but minimise interaction</td>
</tr>
<tr>
<td>Build relationship</td>
<td>Foster acceptance by building understanding</td>
</tr>
<tr>
<td>Foster mutual adaptation</td>
<td>&quot;this involves all parties accepting and understanding differences and diversity, recognising that such an approach will probably require changes in the culture and systems of the organisation&quot; (Kramar, 1998, p. 131)</td>
</tr>
</tbody>
</table>

Source: Kramar, 1998

The capabilities framework takes the debate beyond opportunity and outcome to capabilities as a third dimension of equality. The focus of such an approach is on an enabling environment, a further development of the "foster mutual adaptation" concept outlined by Thomas and Kramar. The capabilities framework is based on three types of capabilities:

1. Basic – the innate abilities upon which people can develop more advanced capabilities – talents, gifts, aptitudes
2. Internal – the developed skills or competencies which make a person ready to act or function – literacy, numeracy
3. Combined – suitable structures or societies in which the internal capabilities can operate and with which they interact. (Nussbaum, 1999 cited in Gagnon & Cornelius, 2000, p. 73).

Gagnon and Cornelius argue that the capabilities approach is "human dignity centred equality" which allows "free" exercise of freedoms, and forces a focus on to the enabling environment. A core component of this approach is the idea that individuals should be able to live the life they value, and feel that they are being treated fairly.
To take Kramar's view that the concept of diversity management will be relevant in the management of an ageing workforce one step further, it might be argued that the same can be said of the capabilities framework. Gagnon and Cornelius allow that their work is a “think piece” and that further development will be required to understand its potential. Certainly the concept of “reasonable adjustment” in the Equal Employment Opportunity literature fits with this idea of capabilities.

More recently the focus for research on older workers tends to be more on generational differences including differences in values and work ethic or on the effects of the increasing median age of workers. Even this does not as yet address workers aged beyond the traditional retirement ages of 60 and 65, probably due to the fact that there are still limited numbers of paid workers in this age group.

2.9 SUMMARY AND CONCLUSIONS

This chapter has examined the literature relevant to the involvement and management of older volunteers. Firstly, volunteering was discussed as a subject for research, and the neo-disciplinary or pre-paradigmatic state of the field was highlighted. This section illustrated that at an international level volunteering research is experiencing an explosion. In Australia, however, while there is steady growth, this is still largely in disparate pockets around the country and largely associated with the discipline or field in which it is undertaken, rather than being recognised as “volunteering” research. Efforts by Volunteering Australia and academics with an interest in volunteering have moved towards consolidating this work, but the constraints of funding and recognition have not provided the impetus for any local explosion.

Volunteering was then discussed with reference to the tensions and contradictions which are the context in which the study took place. It illustrated that volunteering is in a time of transition and growth with tensions in the field contributing to the lack of recognition and status afforded volunteers and volunteering in society. The difficulties in “measurement” both contribute to this and serve to provide somewhat limited data on the field.

At the core of this literature review was the examination of the literature pertaining to managing the performance of older volunteers. The evidence which the extant literature does provide includes that it is likely to be inappropriate to consider
all older volunteers over the age of 55 as one group. The identification of “older” volunteers establishes that the term is vague and that there have been efforts in the literature to categorise older volunteers into smaller groups. This discussion also establishes that a lot of older Australians are involved in volunteering, for a number of reasons, and across a wide range of activities. The available statistics, however, do not offer useful data about older volunteers in Western Australia except in a very broad sense.

The review has examined the literature on the differences between managing paid workers and managing volunteers, and established the importance of drawing on this valuable body of knowledge, and on adapting this knowledge to recognise that volunteers are different. It has identified the motivations of volunteers, including that older volunteers may differ from their younger counterparts, and confirmed that the performance of volunteers is important. It is clear from the literature on older volunteers that the situation faced by managers of older volunteers when they believe that an older person is no longer capable of undertaking their work is not new.

What is also clear, however, is that there is very little research which attempts to examine this situation from the perspectives of the actors, particularly the volunteers. What research has been done has been largely positivist in nature, in Britain or in North America, or in the case of Williams, from the organisational perspective only. It also provides evidence that older volunteers are often seen to be more experienced, more reliable, have more time and be more loyal than many of their younger counterparts.

This review established the importance of probing the concerns expressed by managers of volunteers to construct their understanding of why and how this situation arises, and to examine the perspectives of volunteers who will be affected by whatever action a manager faced with declining performance takes.

The review also draws on mainstream management literature on managing older workers, and examines the elements of managing older workers which might further inform the research on older volunteers. The review shows that myths and stereotypes about older workers play a role in the management of older workers in Australia. The evidence is that chronological age is not necessarily a predictor of work performance, but that managers often expect declining performance from older workers. This section of the review advances the argument that managers in the paid
workforce may not yet have had to face the issue of performance in relation to older workers who have reached the fourth age (that is, over 75 years of age) due to the low numbers of older people who are still employed beyond 65 years of age. The examination of literature from the management field also suggests that a capabilities framework, still in development for use in managing difference in the workplace, may offer some insights which could be of use in the development of management strategies for an ageing workforce.

In summary the literature provides a range of conclusions which contribute to the development of the research.

- Managing volunteers is seen to be different to managing paid workers. This is partly due to the philosophical underpinning of volunteering, and partly due to the different psychological contract between the volunteer and the organisation. One of the tensions which exists in the management of volunteers is that of the line between volunteering and paid work, and this manifests itself in the expectations which volunteers bring to their volunteer work.

- When considering older people who volunteer it is clear that they bring wisdom, time and experience to their organisations. Older people who volunteer are likely to do so for a number of reasons, some of them different from their younger counterparts.

- Organisations will have requirements such as risk management and insurance, client wellbeing and funding, which make quality and performance an important element of their functioning. There may be a clash between the stated requirements of the organisation and the wellbeing needs of the individual volunteer. These form the basis of a dilemma for the manager when that manager considers that the volunteer's performance has declined. It is clear, however, that while the research which has been conducted to date has established older volunteer performance does come into question, it has not examined this situation in-depth, or from the perspective of the volunteer.

- The research about the paid workforce has established that there are changes in capabilities which are associated with increasing age, but it is clear that managers of paid workers have yet to experience ageing workers in any great numbers, with the effects of the abolition of compulsory retirement still to be felt in paid work. Assumptions, myths and stereotypes have already been found to play a role in the management of older workers. The social construction of age means that despite evidence to the contrary older workers are considered by managers to require a different approach to their younger counterparts.

This review leads to the following propositions:

- Research in the area of volunteering is in a neo-disciplinary or pre-paradigmatic state. The field is fraught with tensions and contradictions which contribute to a complex environment which contributes to volunteering not enjoying the status which might be afforded to it in the event that its contribution to society were more highly valued.
• Exploration of the experiences of the volunteer and the manager may assist in better understanding the management of performance in older volunteers.

• Differing assumptions by volunteers and managers about who are "older volunteers" and of their capabilities of older volunteers may play a role in the evaluation of performance of older volunteers.

• If the recruitment of baby boomers into volunteering is to continue the numbers of older volunteers are likely to increase, and thus the incidence of this situation is likely to increase.

• It is likely that if the pressure for people to work beyond retirement age continues, and as those who have chosen not to retire age, the paid workforce is also likely to begin to encounter similar sorts of issues.

The majority of the literature reviewed on the topic of older volunteers has been either prescriptive and practitioner oriented, or where empirical research has been undertaken this has been from a positivist perspective, with even the limited qualitative research being largely positivist in its approach. It is clear that there is a need for in-depth research which examines the involvement of older volunteers in organisations from the perspective of both the manager and the volunteer, in particular the situation which arises when the manager believes that a volunteer is not performing to the standard required by the organisation.

It is appropriate to undertake this study in an interpretivist paradigm to seek to gain a more in-depth understanding of the perspectives of the managers and the volunteers on the management and involvement of older volunteers. It is also clear that the context in which volunteer management takes place is an important part of the picture. The research approach and the associated research processes will be discussed in Chapter Three.
ORGANISATION OF THE THESIS

Chapter One
Introduction
Managing older volunteers:
A subject for study

Chapter Two
Literature Review -
Older volunteers and volunteering

Chapter Three
Methodology
Research questions and approach

Chapter Four
Results Phase One
Establishing context

Chapter Five
Results Phase Two
Voices and viewpoints

Chapter Six
Findings
Synthesis and interpretation of results

Chapter Seven
Conclusion
Implications and the future
CHAPTER THREE  METHODOLOGY – RESEARCH QUESTIONS AND APPROACH

3.1 INTRODUCTION

The literature review has identified that the context in which volunteering takes place in Australia is in a state of some uncertainty, and has also identified that there is no qualitative research undertaken on the actor’s point of view which explores the management of the performance of older volunteers. This chapter outlines the methodological underpinnings of the current study which was undertaken in an interpretivist framework. It outlines the processes which took place in this study, including adoption at the outset of a research tool from another paradigm for a preliminary context exploration phase, the employment of a grounded theory approach, and the identification of sensemaking as an appropriate diagnostic tool in data analysis.

In the previous chapter a need for better understanding of the management of performance of older volunteers has been considered after it was identified in a study on the use of feedback in performance (Paull, 2000). The literature review has established that the context in which volunteering takes place is complex and under-researched, and that it is in a pre-paradigmatic or neo-disciplinary state. What research exists is disparate, and some of the discussions about terminology and measurement contribute to a lack of clarity and recognition of volunteering. The review also identified that volunteering as a subject for research is experiencing considerable growth, but that in Australia this is still in its adolescence, and often located within specialist areas or disciplines.

The literature review also demonstrated the absence of an in-depth understanding of the differing perspectives of the actors engaged in involving older people in volunteering – both the "managers" and the volunteers. It identified that there is little research investigating the differing perspectives of the actors when a decline in performance is attributed to the ageing process. In a positivist or quantitative study this chapter would follow a format long established, and to some degree prescribed, by the many who have gone before. In the development of a qualitative study in an interpretivist paradigm it is necessary to develop an approach
which is meaningful to all who read it, one which is self generating and relevant to the study itself and which also addresses the methodological issues associated with selecting an approach for which "there are few faculty members in departments of organisation and management who have pursued qualitative research in general and the grounded theory style in particular" (Locke, 2001, vii). This chapter outlines the research process in a largely chronological order with the theoretical underpinnings outlined at each stage of the discussion.

3.1.1 Adoption of research methods

In order to make a contribution to the knowledge about volunteering in Western Australia, and to the body of knowledge about managing older volunteers, I decided to develop two phases of data collection and employ a methodology which while posited within the interpretivist paradigm, also employed survey methods more often associated with the positivist approach. At first I saw the two phases fitting together as depicted in Figure 3.1 (Note: the development of the research methodology is depicted in Figures 3.1, 3.3 and 3.5 which are included in this chapter and repeated in Appendix F for ease of reference).

![Figure 3.1: Initial research method framework](image)

The two phases of the research were developed to be complementary.
- Phase One: survey based data gathering strategy to explore context and inform data collection for Phase Two.
- Phase Two: in-depth interviews within case study organisations.
As the study unfolded I questioned the value of the first data collection phase. The usefulness of the quantitative data collected in relation to the main research questions diminished somewhat, particularly in relation to a seeming lack of depth when compared to the interview data collected in Phase Two. My understanding and appreciation of the different types of data collected in the different phases contributed to my understanding and appreciation of the different research approaches, and is discussed in Megan’s story at the conclusion of Chapter Seven. The most useful contextual data for me came from the analysis of the data collected in the second phase, from in-depth discussions with the actors themselves, who are knowledgeable and informed, and from close examination and analysis of their contributions. The relative depth of the data is further examined in Chapters Four and Five where the data from each phase are discussed.

This chapter outlines the development and evolution of the research questions explored in Phase One and Phase Two of data collection, the choices associated with the methodological approach, and the selection of research processes and techniques. It then details those processes and techniques as they unfolded during the research. First, however, it outlines a workshop conducted prior to the research proposal being developed.

Workshop

The central focus of this research was a problem which was identified by managers of volunteers who participated in an earlier study (Paull, 2000), one which was not pursued for that study as being beyond its scope. It was important to commence by confirming that a research problem worthy of pursuit in a doctoral study existed. With the approval of the University Ethics Committee, I conducted an exploratory workshop in June 2001 to obtain more specific information about the nature of the concerns of managers and co-ordinators of volunteers. The focus of this workshop was to clarify whether a research problem existed, and seek some orientation as to what some of the issues and questions associated with that problem might be.

Preliminary advice was sought on the value of undertaking a study which explored this topic, and to ask expert opinion as to whether there was a need for such research. A small group was approached with the help of Volunteering Western Australia and a workshop was held to explore some of the preliminary questions
which had arisen. Participants in the workshop were managers and co-ordinators of volunteers, similar to the group who participated in the study which originally identified the research question. The discussion explored some of the issues which had been thrown up by a preliminary literature scan, considered the data from the previous study which had led to the research issue being identified, and explored the management of older volunteers as a general topic. A thematic analysis was conducted and the workshop identified the following:

- There is evidence that managers of volunteers consider seniors\(^4\) to be a major and important source of volunteers in Western Australia.
- Managers of volunteers believe there are issues and questions to be examined related to the management of older volunteers.
- There is support for this research to be conducted from amongst practitioner volunteer managers and co-ordinators.

Preliminary data from this workshop included:

- Managers of volunteers consider that to categorise all volunteers over a certain age as older volunteers may ignore important differences between age cohorts;
- Managers and co-ordinators of volunteers value their older volunteers, and see them as committed, capable and valuable contributors to their organisations;
- Managers and co-ordinators of volunteers do believe they encounter difficulties in managing volunteers from time to time; such difficulties are seen to be associated with, amongst other things, the effects of ageing on health and fitness.
- Managers of volunteers believe the reasons for volunteering and reasons for continuing to volunteer may play a significant role in managing older volunteers;
- Declining performance due to age is only one area where managers and co-ordinators report encountering difficulties with some older volunteers. Others include resistance to change, "social" volunteering, and varied levels of commitment to the organisation. ("Social" volunteering was a term used by participants in the workshop to refer to those who come to the volunteer activity not to undertake volunteer work but for the social contact with other volunteers. This was occasionally seen as preventing volunteers from focussing on the task at hand.)

The workshop led to the conclusion that there was enough support for further research, and that the topic selected was of sufficient depth to constitute a doctoral thesis topic. The next step was to develop the initial research questions.

\(^4\) The term "seniors" was the term used in the early part of this study to denote older volunteers. It was discarded at a later point in this research due to the findings associated with understanding "older" and seniors. These outcomes of the initial workshop are presented as they were written up at the time.
3.2 CREATING INTERPRETIVE RESEARCH QUESTIONS

Merriam (1998) talks of the formation of the research question as "the thing you are curious about" which reflects the theoretical framework and the gap identified in the knowledge base. The literature review has established that there is a need for in-depth research which examines the differing perspectives of the actors on the management of older people in volunteer-involving organisations, in particular when the manager believes that a volunteer is not performing to the standard required by the organisation. This is "the thing" about which I am curious.

In hypothetico-deductive models of research the investigation begins with a theory or theories, moves from the creation of operational definitions and concepts to propose relationships between these, and then out to the field to observe and test. Thus, the commencement point is the creation of a question and hypotheses. In "grounded research" which relies on the actors' point of view, the process is to some degree reversed. Locke (2001, p. 37) talks of the process of the research as involving "the move from empirical observation to composing conceptual categories and to delineating the ways in which the categories relate to each other."

Blaikie (1993, p. 176) describes the abductive process, discussed in detail later, as incorporating the elements ignored by positivism and critical rationalism "that is, the meanings and interpretations, the motives and intentions, which people use in their everyday lives, and which direct their behaviour – and elevates them to the central place in social theory and research." Thus, the development of the research question involves the researcher discovering and describing the "insider view" rather than imposing an outsider view or opinion (Evered & Louis, 1981). Further, the questions need to be framed so as to capture the idea of the perspectives of the actors, and focus on the area of interest.

As has been demonstrated there is limited research on the "thing [I was] curious about", and no study was located which examined the issues from the perspectives of both the manager and the volunteer. Cresswell (2003) identifies qualitative research questions as requiring several characteristics. He directs researchers to:
- relate central question to specific qualitative strategy;
- begin with "what" or "how", not "why";
- use exploratory verbs;
The three major research questions provide orientation for the methodology, including data collection techniques, analysis, and synthesis of results.

**Question 1:** What are the ways management of older volunteers are experienced by volunteers and managers in volunteer-involving organisations in Western Australia?

**Question 2:** What are the experiences of managers and older volunteers when a manager perceives that an older volunteer's performance is declining due to age?

**Question 3:** What are the major contextual factors which are contributing to those experiences?

Context is important to contemporary grounded research approaches which recognise that the actor's point of view is influenced by and interacts with the context in which it forms and operates, and that the continuous construction and reconstruction of the individual's point of view occurs in that context (Berger & Luckman, 1966; Blaikie, 1993; Giddens, 1990). This is discussed later in this chapter.

In keeping with a grounded research approach the initial questions evolved as the study progressed. Journal entries in the research journal show a metamorphosis of the issues being examined from the initial focus on what had prompted the study to a broader exploration of the questions outlined above. Analysis and theory generation involved following the directions indicated by the data and developing insights based on the data itself and not bound by the research questions.

A subsidiary research question became important in the collection and analysis of data:

**Emergent question:** What is meant by "older volunteers"?

This question has formed an important part of the findings of this study.

### 3.3 Definitions and Terminology

Given that the research was undertaken in a paradigm that considers the actors point of view to be that which is important, self identifying volunteer-involving organisations were recruited to take part in the research, as were self identifying volunteers (see discussion of this with regard to answers to surveys in Section 4.4.1).
The complexities of defining volunteering and identifying who is “older”, which were considered in the literature review, became part of the discussion in data collection and are returned to in the findings of this research. At this point it is sufficient to say that the participants identified themselves as volunteers involved in volunteer-involving organisations, or managers of volunteers working in volunteer-involving organisations. Volunteer-involving organisations is a term which is used sporadically throughout the literature, mainly by Volunteering Australia as an all encompassing term which does not categorise the organisation except insofar as volunteers carry out some of the work of the organisation.

As far as “older volunteers” is concerned, an arbitrary starting point of the over 55 age group was identified as constituting “older” volunteers in keeping with the approach of the Positive Ageing Foundation which facilitated the distribution of questionnaires to people who had agreed to be included on the Positive Ageing Foundation Research Group. As foreshadowed above, the concept of “older volunteers” evolves as the study progresses.

3.4 DESIGN OF THE RESEARCH: MAKING CHOICES

Central to the selection of research techniques is an informed choice among alternatives for the type of research to be undertaken. The various options bring with them different traditions, and diverse research techniques. Locating research within a particular approach, or paradigm, provides the researcher with an orientation to theory and research, a whole system of thinking which includes basic assumptions, questions and techniques. Morgan (1983, p. 19) likens it to choosing the appropriate equipment for a game, such as a tennis racquet for tennis, or golf clubs for golf. Merriam (1998, p. 5) states that

*getting started on a research project begins with examining your own orientation to basic tenets about the nature of reality, the purpose of doing research, and the type of knowledge to be produced through your efforts.*

Merriam (1998, pp. 6-8) identifies that qualitative research has five characteristics common to most of its types: interest in the “meaning people have constructed” of the world; “the researcher as the primary instrument for data collection and analysis”; the use of field work; the use of an “inductive research strategy” which builds theory; and rich description as an outcome. Merriam (1998, p.
8) also identifies the desirability of a research process which is "emergent and flexible" and responds to the changing needs of the study.

The choice to undertake a qualitative study comes from the need identified from the literature to explore the meanings and perspectives of the actors (informants or participants) in relation to the involvement of older volunteers. The people from whom the research problem arose expressed emotional involvement in the management of older volunteers and this is confirmed by the data in Chapter Five. Their search for understanding of the perceived problem came from the organisational demands for volunteer performance, and from the clash with their values when they perceived that an older volunteer was no longer able to perform their volunteer work as the organisation might demand. Older volunteers do not necessarily view the "problem" from the same perspective as the managers, and therefore an approach which draws on the differing perspectives of the actors is appropriate for this study.

This study is divided into two separate phases. The first phase is a contextual data gathering phase designed to inform and guide the second phase. Both are conducted within an interpretivist framework. The second phase employs in-depth interview techniques applied in an interpretivist framework, and often associated with qualitative data gathering processes. The use of grounded research techniques is central to data collection. For the purpose of establishing context, however, the data gathering phase employs processes which are more often associated with the positivist rather than interpretivist approach to data collection. The adoption of a process from another approach brings with it a myriad of complications and concerns which have been the subject of some debate and discussion amongst researchers, and are addressed shortly.

3.4.1 Choosing Interpretivism: The study of meaningful social action

The interpretive approach to research is concerned with how people manage their practical affairs in every day life – that is, how they get things done, how they interact and get along, or do not get along, with each other. Neumann (1997, p. 68) defines the interpretive approach as "the systematic analysis of socially meaningful action through the direct detailed observation of people in natural settings in order to arrive at understandings and interpretations of how people create and maintain their social worlds."
The interpretivist approach is based on a number of epistemological and ontological assumptions about knowledge and research:

- The basic nature of social reality is subjective and social life is based on the interactions between the actors and their socially constructed meaning systems.
- People are constantly interpreting the social world as it evolves and they use their interpretations to make sense of their lives and of the world around them.
- Facts are fluid and embedded in the context, and people assign meaning in context, thus both situational and voluntary factors influence human behaviour.
- Truth arises from the reality of those being studied, and theories are “true” if they make sense to those being studied, and allow others to enter and understand the “truth” of the actors.
- The goal of the research is to discover and share the perspective(s) of the actor(s).
- Research is ideographic, providing a symbolic representation of the social setting and the actions and experiences of the people being studied; it tells a story and requires first hand knowledge of the subject under investigation.
- The researcher is part of the research and brings his or her own values and points of view to the research, engages with the research and with those being studied, and is involved in a process to empathise with and share the values of the actors.

(Burrell & Morgan, 1979; Neumann, 1997)

Note the relationship to context which is emphasised by these assumptions, in particular, with regard to meaning being assigned in context.

The interpretive approach provides a foundation for research that is sensitive to the context in which the actors or informants operate, applies a number of methods to explore and examine how they see their world, and is concerned with what Neumann (1997, p. 73) refers to as “an empathic understanding of feelings and world views”.

There are many factors to be considered with choosing an appropriate research methodology, with the topic to be researched and the specific research questions being the most important (Remenyi, Williams, Money & Swartz, 1998). It is important that the ultimate purpose is to add something of value to the body of accumulated knowledge, in this case about managing and organising. According to Yin (1994), research strategy should be chosen as a function of the research situation. In this case two elements are important, one being the limited qualitative research in the field, and the other the nature of the contextual data which is available.

It is therefore appropriate, given the emphasis on social construction, to select an approach which allows general contextual data to be gathered, where the results
will be deep, rich and meaningful, will explore the issue from the perspective of those being studied, will promote modification, growth and development of the research process, will involve the development of theory, and will take into consideration the sensitivity of the issue under investigation.

3.4.2 Comparison with positivism

A comparison between an interpretive approach and a positivist approach highlights the key differences between paradigms. The epistemological and ontological assumptions on which research is based are different.

There are arguments in favour of adopting one approach to research and observing a strict adherence to the underlying assumptions associated with that approach (e.g. Miles & Huberman, 1994) referred to by Burrell and Morgan as "paradigmatic closure" (1979, p. 398). Many of these arguments relate to manageability of the size and scope of the project and are pragmatic rather than theoretical in their basis. There is an increasing acceptance that a combination of research methods can be very powerful in gaining insights into the phenomenon under investigation (Jones, 1997). The manner in which this is done needs to be carefully planned, and there are a number of ways it can be achieved. One of these is borrowing tools from more than one paradigm. The other is by developing and revising the methodology to include new dimensions. The inclusion of "context" and the importance of social construction in Blaikie's (1993) theory of abduction, Giddens' (1979; 1990; 1993) theory of structuration and the work of Weick (1995), and Weick et al (2005) on sensemaking revised traditional grounded theory methodologies developed by Glazer and Strauss. This is discussed later.

3.4.3 Incorporation of tools from other paradigms

Gioia and Pite (1990) argue that there are situations in which "scholars [can] develop more comprehensive views by examining and, if possible accounting for the work of alternative paradigms". They consider the fundamental ontological and epistemological assumptions and related methodologies of the four paradigms identified by Burrell and Morgan (1979) namely, radical humanist, radical structuralist, interpretivist and functionalist (or positivist). Gioia and Pite acknowledge the dominance of the positivist paradigm in organisational research. It
can be argued, however, that this dominance has reduced in the intervening years, and this has been acknowledged in a number of ways with debate about paradigm incommensurability and paradigm closure becoming an important part of understanding the employment of research approaches.

Mingers and Brockelsby (1997) suggest that

*In order to make the most effective contribution in dealing with the richness of the real world, it is desirable to go beyond using a single methodology to generally combining several methodologies, in whole or in part and possibly from different paradigms.*

Writing in the area of Management Science, they outline a range of possibilities for achieving this. They delineate the different possibilities as being based on:

* whether more than one methodology is used or not;
* whether the methodologies used come from the same or from different paradigms;
* whether or not they are used within the same intervention; and
* whether whole methodologies are used or parts are taken out and combined.

Paradigm incommensurability has been the subject of some considerable debate (e.g. Jackson & Carter, 1991; 1993; Wilmott, 1990; 1993). Mingers and Brockelsby (1997) argue, however, that not only are there occasions when multi-methodology is feasible, but there are also times when it is desirable. Thus, it can be argued that it is not just the choice of the researcher but also something which is encouraged by the nature of the problem being investigated. Desirability, argue Mingers and Brockelsby, stems from four concepts outlined as the multi-dimensional world, intervention, practice and postmodernism. The most convincing argument is that as the world is multidimensional, and exists not only as the material and objective world but also involves the human element in its social and personal dimensions, any research process or intervention must take into account such combinations in order to be effective. In the postmodern world, practice is already offering numerous examples of a multi-methodology, perhaps putting practice ahead of theory in the recognition of the multidimensional world view. Thus, they argue, in a world where problems are highly complex and multidimensional, different paradigms and their constituent research processes allow researchers to develop their interventions through a series of phases which are useful in addressing the phenomenon under investigation. In the current study it was considered to be useful to better understand the context in which
the phenomenon under investigation takes place, especially given what had been
determined about the current state of the literature on context.

It is still necessary, however, to employ the appropriate processes at the
appropriate times and to be selective in combining methodologies (Goulding, 1999).
Strauss and Corbin (1990) pose the question "can I combine quantitative and
qualitative methods in the same study?" and are very firm in their positive response.
They do, however, warn that "they must be built into the theory as further verification
of conditions, action/interaction, consequences and so forth" (p. 191).

The philosophical differences which accompany the concept of paradigm
incommensurability to some degree reflect the underpinning philosophical differences
which accompany the paradigms considered to be incommensurable. That is to say
paradigms which are more tolerant, and even welcoming, of ambiguity and
uncertainty are also more tolerant of pluralism and multi-methodology. The
incommensurability thesis itself, in this scenario, is unitarist and intolerant of
ambiguity and uncertainty, and this is one of its underpinning tenets, thus positioning
it in a positivist framework. The debate on paradigm incommensurability has surged
and receded over the years with many highly regarded scholars taking a position in
this debate (e.g. Burrell & Morgan, 1979; Hassard, 1991; Hatch, 1997; Kuhn, 2003).
It can be argued that it is the functionalist/positivist paradigm which takes the view
that there can only be one truth and therefore one paradigm in which to operate. When
working in an alternative paradigm, however, some might argue that in order to be
true to the paradigm in which you are working, it is necessary to remain true to the
ontological and epistemological assumptions underpinning that approach. At times
then it may be that even when incorporating research tools most often used within
another paradigm, the researcher needs to be highly aware of the assumptions
underpinning the paradigm from which the tool originated, and take care to hold
uppermost the assumptions of the paradigm in which the study has been posited.

Mingers and Brockelsby (1997) argue that the researcher's own cultural
orientation, values, beliefs and assumptions might prevent movement from one
paradigm to another. They suggest that to move between paradigms is "by no means a
simple matter" (p. 499), but that it is likely to be more difficult for a researcher whose
training and preferences or cultural orientation is towards a single methodology. This
view became important during the course of the current study, due to my initial
training and experience being in a positivist paradigm, and the move towards an interpretivist framework was at times challenging and frustrating (See Megan's story in Chapter Seven).

A further obstacle to feasibility is said by Mingers and Brockelsby to be cognitive. The most important element of their argument is that mere learning of the propositional underpinnings of a new paradigm is insufficient for successful operation in that paradigm. “Really knowing the paradigm – acting effectively in it – makes more substantial demands, and these can only be satisfied through active bodily involvement, experience and practice” (1997, p. 500). The step across the divide is not one easily taken.

The combination of methods in this study has been undertaken in line with the fourth possibility outlined by Mingers and Brockelsby where one part of one process has been taken from another paradigm and, in the words of Strauss and Corbin (1990, p. 191) has been “made part of the theory itself through the paradigm” in which the study has been conducted, in order to avoid them becoming “merely an aside”. In this study survey questionnaires have been used within an interpretivist framework to develop the contextual data for this study. This is in keeping with the growth and development of grounded theory since the 1970s during which time the importance of context to the actor's understanding of their world has been recognised (e.g. Blaikie's abduction theory, 1993; Giddens' structuration theory 1990; 1993). Essentially this is not a case of “borrowing” tools from another paradigm; it is incorporation into the process and not “merely an aside”.

Figure 3.2 (column 1 extracted from Gioia and Pitre, 1990) outlines the interpretivist paradigm in which the research has been conducted, with a commentary about the research process.
**Interpretivist Paradigm**

(Copied from Gioia & Pitre, 1990)

**STEPS TOWARDS THEORY BUILDING**

**Opening work**

SELECTING A TOPIC
What are the issues?
What are the research questions?
DESIGNING RESEARCH
What are data?
Where to find data?
How to measure data?

**Data collection**

IDENTIFYING SPECIFIC CASES
QUESTIONING INFORMANTS
According to what is relevant to them in context

**Analysis**

CODING
Provide a description at first and something second level of abstraction
FORMULATING CONJECTURES
Identify the relations between concepts at first level or across levels of formulation
EVALUATING CONJECTURES
Validate with informants through new data collection

FORMULATING THEORY
Identify the emerging concepts and relationships

REVIEWING LITERATURE
Identify what was already known

Theory building

WRITING UP A SUBSTANTIVE THEORY
Show how it all fits together

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**Parallel commentary on variations for this thesis**

**Issues, questions arose from previous research conducted in positivist paradigm.**

Previous research, researcher familiarity with field and literature review established lack of research of subjective in-depth nature, plus lack of contextual data in Western Australia.

**Phase One: Seeking contextual data**

Lack of contextual data – survey questionnaire format informs next stage. Development of questionnaire data includes opportunity for respondents to add free response data.

**Phase Two: In-depth interview data**

Framework established using data from Phase One and literature review.

Data analysis undertaken using:
- Constant comparison
- Saturation
- Theory building uses
- Abductive approach

Link to existing literature

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Figure 3.2A: Gioia and Pitre’s phases of data collection within the interpretivist paradigm

Figure 3.2B: Commentary on phases of data collection for this thesis
3.5 RESEARCH STRATEGIES: CONTEXTUAL SURVEYS

The research strategies employed in this study commenced with the contextual surveys of managers in volunteer-involving organisations, and of older people.

Phase One employed survey techniques to provide contextual information and to inform the data gathering processes in Phase Two. As has been discussed elsewhere, the research field is in a pre-paradigmatic or neoclassical state, and the data about the context in which volunteering takes place is complex and in a state of growth and exploration. There were also, as discussed in the literature review, some limitations to the available data on the rate and extent of volunteering in Australia, in particular, how many volunteers of what age groups were active in volunteer-involving organisations.

Phase One used a survey method seeking to ask those who are likely to know about their perspectives on the phenomenon under investigation to provide a contextual picture of volunteering by older people. At the beginning, the gathering of contextual data in this manner was to inform the preparation of frameworks for gathering data in Phase Two. Locke (2001, p. 103) discusses the development of preparatory frameworks in the context of the selection and combination of "intermediate data reduction and ordering mechanisms". Such mechanisms may constrain the potential for understanding the phenomenon under investigation by having "prior theory set the terms for what [researchers] will find" (Locke, 2001, p. 104), and be "one more step removed from the empirical situations...studied". The advantage, however, of taking such a step is to reduce the possibility of being "overwhelmed by the sheer volume of unstructured data" (Locke, 2001, p. 102) thus making the task more manageable.

As has been discussed in the literature review, existing contextual data relating to volunteering by older people in Western Australia is limited, and there is only a small amount of contextual data available Australia-wide. Therefore, survey methods were employed to explore this. This phase of data collection contained two concurrent elements. The survey techniques involved a short survey of volunteer-involving organisations to get an overall picture of the views of managers of older volunteers, and a short survey of seniors (older people) to get a picture of their views of their experiences when volunteering.
3.5.1 Survey of managers of volunteers

One element was the mail survey of volunteer managers in a sample of volunteer-involving organisations. Organisations with older volunteers are not all members of Volunteering Western Australia, but it was considered to be an appropriate strategy in keeping with the overall research approach to select from amongst the membership of this organisation whose primary concern is volunteering in this state. Volunteering Western Australia has over 300 volunteer-involving organisations amongst its membership, including some well known and very large organisations, as well as some lesser known and relatively small ones. The sample of 100 organisations (almost one-third of VWA membership) was selected based on their likelihood of involving older volunteers in their organisation. The selection process was done in consultation with Volunteering Western Australia staff who identified organisations likely to have older volunteers in their workforce. Volunteering Western Australia publishes its membership list in its annual report, but mailing addresses and contact names are not made available to any individual or organisation due to privacy considerations. Once the selected list was assembled, the assembled questionnaires including the reply paid envelopes were provided to VWA for mailing out. The cost of the mail out was borne by the researcher. VWA has an ethics approval process in place to protect its membership in relation to research projects.

Content of survey of managers

The survey questionnaire sought the following data.

- Agency data: Size of agency, number of volunteers, number of paid workers, number of volunteer support staff paid and unpaid (this data to be collected as FTEs/hours per week/number of people), type of work undertaken by agency, type of work undertaken by volunteers

- Data about the volunteer manager or co-ordinator: support, duties other than volunteer management, length of service with organisation, length of time as volunteer manager both with this organisation and others, involvement in volunteer activity within and outside the organisation, gender, age group, ethnic background, level of education, training/education in management, training/education in volunteer management

- Data about policies and systems in place in organisations
- Recruitment and selection, training, performance management, communication, support etc for volunteers, any specific policies or programmes for older volunteers
- Attitudes and perceptions of the volunteer managers/co-ordinators about older volunteers, including benefits and disadvantages of having older volunteers in the organisation
- Anecdotes/stories about older volunteers
- Specific questions about managing older volunteers, for example, insurance requirements, patterns and trends in why volunteers leave, any problems or issues, do they "retire" volunteers.

In keeping with the interpretivist approach survey respondents were also provided with opportunities for free responses on the issue under investigation.

Development of this instrument was largely influenced by the work of Fischer and Schaffer (1993), Forster (1997) and Williams (1995) and by the instruments developed for earlier research projects (Paull, 2000). A copy of the questionnaire is included at Appendix A.

Volunteering Western Australia sent out the questionnaires to a sample of 100 member agencies selected from the publicly available list in the annual report. Names of contact persons and mailing addresses were not disclosed to the researcher by Volunteering Western Australia who undertook the mailout based on the list provided. The list was developed to try and achieve a spread of organisations in different sectors (e.g. welfare, environmental), of different sizes, and whether they were known or not known to the researcher.

The questionnaires were developed using instruments which had been used previously by Paull (2000) and Williams (1995) and by reference to overseas studies such as Forster (1997). A copy of the questionnaire is included in Appendix A.

3.5.2 Survey of older people

The second element of this contextual data collection was a mail survey of older people about their volunteering experiences. Once again in keeping with the research strategy an organisation whose primary concern is older people was considered to be an appropriate place to seek assistance with data collection from older people. The Positive Ageing Foundation promotes research which is in the interests of older people, and has a database of older people who have expressed a willingness to be involved in such research. A random sample of 500 seniors was
selected from those listed on the research database (n=3400). Not all persons registered on this database are necessarily involved in volunteer work. The sample was set up by the Foundation in a stratified way to ensure a spread across age groupings, postcodes and genders. The processes for accessing this database involved privacy arrangements and ethics approval from the Positive Ageing Foundation similar to that of Volunteering Western Australia.

**Content of survey**

This instrument sought the following from respondents:

- basic demographic data;
- volunteering activity data;
- perceptions attitudes about volunteering;
- perceptions/attitudes about older people volunteering;
- opinions about the management of older volunteers;
- information about experiences of volunteering; and
- anecdotes stories about older volunteers.

As with the other questionnaire, opportunity for free responses was included in the questionnaire to open up new avenues of enquiry not yet contemplated by the researcher as part of the process of developing the actor’s perspective about the phenomenon under investigation.

This instrument was developed using information obtained from the earlier research by Fischer and Schaffer (1993); Forster (1997) and Williams (1995) and by the instruments developed by this researcher (Paull, 2000). This instrument was constructed to be compatible with the instrument developed for the survey of managers of volunteers to enable some comparisons to be made. Former volunteers were asked about any previous volunteer activity and reasons for ceasing, while non-volunteers were asked about factors which may have prevented them from volunteering. A copy of the instrument is attached at Appendix B. The assistance of the Positive Ageing Foundation was sought in sending out 500 questionnaires to a sample of the over 4500 on the database. The distribution of these across age groups, genders and postcodes was undertaken to try to achieve a range of responses from the different groups.
Sample profile

Table 3.1 shows the spread of the sample across these variables.

<table>
<thead>
<tr>
<th>AGE</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Metro</td>
<td>Country</td>
</tr>
<tr>
<td>50-54</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>55-59</td>
<td>24</td>
<td>9</td>
</tr>
<tr>
<td>60-64</td>
<td>26</td>
<td>19</td>
</tr>
<tr>
<td>65-69</td>
<td>25</td>
<td>18</td>
</tr>
<tr>
<td>70-74</td>
<td>24</td>
<td>15</td>
</tr>
<tr>
<td>75-79</td>
<td>21</td>
<td>8</td>
</tr>
<tr>
<td>80-84</td>
<td>13</td>
<td>4</td>
</tr>
<tr>
<td>85+</td>
<td>16</td>
<td>6</td>
</tr>
<tr>
<td>TOTAL</td>
<td>166</td>
<td>84</td>
</tr>
</tbody>
</table>

This meant that the gender spread was about equal and the metro and country split was about two-thirds: one-third across each age group. In the 50 to 54 and 55 to 59 group the males represented the total number on the database, and females the total females in that age group in the country.

3.5.3 Data analysis for Phase One

SPSS Version 10 was employed as a quantitative data analysis tool. The analysis involved included demographic data about the respondents, and elementary analysis about relationships between data was also conducted to establish possible patterns and themes. Descriptive data about the organisations responding to the organisational questionnaire and about the individuals responding to the older persons questionnaire was compiled. More importantly, in the context of an interpretive study, free response data from the questionnaires was collated and summarised. Both the collated data and the summary were included in the qualitative data analysis conducted for Phase Two of this study.

The results of this phase of data collection are, therefore, reported in two places in this thesis. Key findings of the first phase of data collection which informed or contributed to the overall study are summarised and presented in Chapter Four. A range of other findings, which while contributing to an overall understanding of the management of older volunteers did not provide in-depth information pertinent to the
current study, are presented in Appendix C at the conclusion of this thesis. As will be discussed later, the contribution of context to the management of older volunteers became more apparent in analysis of the in-depth data gathered in Phase Two of this research.

3.6 RESEARCH STRATEGIES – IN-DEPTH DATA COLLECTION

3.6.1 Interviewing

This second phase of data collection in this study was undertaken by interviewing. In each organisation those “most likely to know” were interviewed, the managers/co-ordinators/those with responsibility for managing volunteer performance, and the volunteers. In some cases those “most likely to know” were not paid managers but volunteers, and in a couple of cases there were also other people who were interviewed because the data indicated that was the direction data collection should go. So theoretical sampling determined direction both in terms of which organisations to approach next, and also which people within organisations. Individual interviews were conducted with managers/co-ordinators and those with responsibility for managing performance. Group interviews in the form of discussions were conducted with volunteers.

The six case study organisations were introduced in the discussion on theoretical sampling in Chapter Three. In each of these organisations, an in-depth interview was conducted with the person designated the manager of volunteers, and with a group of volunteers who had agreed to participate in this research. In some of the organisations an additional in-depth interview was conducted with an additional individual where the data led to their inclusion in order to flesh out some area of discussion or interest.

The managers interviewed were all experienced in their roles, although some had occupied the position longer than others. All but one were female, and their roles ranged from unpaid president of a voluntary association to a part time paid co-ordinator with other duties, a volunteer co-ordinator also participating in the volunteer activity, and a full time paid manager whose responsibilities all relate to the volunteer programme.
The volunteers who participated were male and female, with varying levels of experience and education, and with service experience across a wide variety of paid and unpaid roles in organisations. The data itself will demonstrate that they are knowledgeable and experienced, and that they are passionately involved in their volunteering. Across the six organisations over 40 volunteers participated in the group interviews, with some having a foot in each camp as both volunteer and manager.

The interviewing process

The interviewing process commenced with a set of questions developed from the literature review and informed by the data collated in the questionnaires. This set of questions was not to be used without variation or as a tool for inquisition, but instead to open up discussion and provide interviewees with some essence of what I was seeking. Unlike interviewing within a positivist framework there is no need to seek consistency across interviews in terms of where the interviews go, but there is a need to have some focus on the phenomenon under investigation. Further, there is a move away from “objective” interviewing. McCracken (1988) talks of the issue of the obtrusive/unobtrusive balance, and discusses the “law of non-direction” where “the interviewer must not engage in what is commonly called ‘active listening’” where the listener reflects back to the speaker. He says “Active listening strategies must not be used by the qualitative researcher” (p. 21). In the style of interviewing required for this study, active listening and exploration are important parts of the data collection process. The creation of dialogue and conversation as a balanced data seeking strategy where the interviewer and interviewee have differing frames of reference and views of the world and a conversation or dialogue takes place to find mutual or shared understanding (Blaikie, 1993; Giddens, 1993). Thus, the interviews are not about discovering and revealing the answers or explanations for what happens, but about discovering and sharing the perspectives, world views, understandings and opinions of the people being interviewed. In this style of interviewing the interviewer is an active participant in the process. There is still a need to sit back and listen, and not “take over” the interview or dominate the conversation, and to “allow the respondent to tell his or her story in his or her own terms.” (McCracken, 1988, p 22). “It is important not to try to suggest to the person how you, as the interviewer, might expect them to respond.” (Ezzy, 2002, p. 68). But it is important to reflect back to the interviewee and ask them about the interpretation being developed of their experience,
particularly towards the end of the interview. Ezzy (2002) suggests that this serves as a check as to whether the interviewer has understood what they are saying. Minichiello, Aroni, Timewell and Alexander (1990, p. 137) suggest that this means “more than listening, nodding and note taking. It means answering, commenting, and attending to conversation sensitively...[while at the same time sustaining] a critical inner dialogue.”

One of the key factors in the interview process from my point of view as interviewer was to become part of the dialogue or conversation rather than adopting the style of interviewing in which I was trained for Human Resource Management practices such as recruitment and selection or performance appraisal, or the journalistic interrogation style of interviewing where the interviewer does not engage with the interviewee.

My aim, while sustaining the critical inner dialogue, was to use “symmetrical” or conversational in-depth interviewing. Oakley (cited in Morrigan & Paull, 2002, p. 11) describes the advantages of this type of interviewing as

*the goal about finding out about people through interviewing is best achieved if the relationship of the interviewer and interviewee is non-hierarchical and when the interviewer is prepared to invest his or her own personal identity in the relationship.*

Such an approach is a relaxed format in which the interview becomes a conversation where the interviewee feels comfortable to ask questions, thus providing more data about their point of view. The subjective involvement of the interviewer aids in engagement.

This interviewing technique is concerned with interpretation of dialogues between two or more people. The process is also called the “hermeneutic circle” or “double hermeneutic” (Blaikie, 1993; Giddens, 1993). The actors, including the researcher, have different understandings of the world, and so an interpretation process consistent with the interpretive paradigm takes place whereby shared understanding is sought. The circular and iterative process which takes place is ongoing throughout the data gathering, interpretation, analysis and theory building process, with the researcher continuing to engage with the other actors by way of the data collected during the interview.
Figure 3.3 illustrates the circular relationship between researcher and researched through dialogue/conversation. Central to this relationship is the interpretation of meaning which involves the development of shared understanding and mutual knowledge. The processes of social construction, making sense, abduction and structuration are all important elements of this. Mutual knowledge and shared understanding are derived from the continuous making and remaking of their world by the actors, in relation to the context in which they are operating. As can be seen from this Figure 3.3, the researcher is not an outside observer but a participant in the process of the development of meaning.

![Figure 3.3: Dialogue as a data collecting technique](image)

Source: Morrigan & Paul, 2002. See also Blaikie, 1993; Giddens 1993

The symmetrical/dialogue approach was used with the individual managers and with the volunteer groups for the group interviews. In the group interview the conversation between the volunteers in the groups was often more revealing in that the volunteers sought shared understanding of each other's views on topics that they had not previously discussed. This methodological gain is discussed later.

The interview content was determined by three factors:

1. the framework which was developed as an interview guide;
2. developments to the guide which occurred as a result of analysis and introduced new ideas and concepts for subsequent interviews; and
3. the development of the particular conversation itself depending on where the interviewee or group went. All the interviews were tape recorded with the permission of participants and then transcribed for analysis using CAQDAS—in this case NVivo.

3.6.2 Data analysis for Phase Two

Computer Aided Qualitative Data Analysis Software, referred to as CAQDAS (Marshall, 1999), NVivo, has been used as a tool in the data analysis process. CAQDAS is a relatively new addition to the researchers’ toolkit, and has been treated warily by many. Marshall (1999) examines the question as to whether it “enhances rigour or stifles creativity”. She presents a view that even between differing qualitative research frameworks there is an increasing tendency towards checking for sources of error in qualitative research. She argues that qualitative researchers have moved from a position of anxiety about “scientific” analysis to one which is “both more grounded in technique...and more sophisticated” (n.p., para 15).

Seale (2000) identifies four advantages and three disadvantages relevant to the selection of a CAQDAS. The advantages include the speed in handling the volumes of data generated by qualitative research, the improvement of rigour in searching for recurring phenomena and deviant events, the development of consistent coding schemes (more an issue for team research) and assistance with snowball and volunteer sampling. Scale also identified three limitations and disadvantages.

The concern that CAQDAS can narrow the approach of the researcher is valid. However, the software is not designed to replace careful consideration of data by the researcher, but rather to facilitate the data analysis process. Scale (2000, p. 165) argues that “experienced researchers have long been aware of the need to treat computers as instruments for pursuing arguments about data rather than limiting thought to what the computer can do.”

The employment of the computer software as a tool for assistance in data analysis was secondary to the interpretation and analysis undertaken by the researcher which saw the data go through several iterations in terms of identifying recurring themes and issues, thematic analysis of the emerging data, and then generation and exploration of emergent theory.
3.7 ON THE DEVELOPMENT OF GROUNDED THEORY

The process of abduction is consistent with Glaser and Strauss' grounded theory (Strauss & Corbin, 1994). In a grounded theory approach, theory generation is an integral part of the research process. This is in contrast to the hypothetico-deductive method, in which theory generation and development precede the data gathering process. Later in this chapter I will explain how Blaikie's abductive theory can be used as a theory building strategy, thus enhancing a grounded theory approach. In the current study there were significant methodological gains achieved as a result of this approach, and these are outlined later in this document.

In a grounded theory approach, concepts and ideas are generated from the data as it is gathered and these are constantly compared with data being gathered in similar contexts, in this study, across cases. The concepts and ideas generated by the comparative analysis are then used to generate substantive theory (related to specific context of the research, and formal theory), a higher level of theory generation relevant in more than one context (Blaikie, 1993; Locke, 2001). Whiteley (2002, p. 18) suggests that in the management field this approach may be more appropriately referred to as grounded research as the key tenets of grounded theory may be lost "when pure grounded theory conditions cannot be met". Locke (2001) points out, however, that one of the underpinning elements of grounded theory is the generation and development of the research process to follow the data where it leads rather than predetermining the direction it will take.

In the generation of theory from the ground up (referred to as either a grounded theory or grounded research approach), Robson cited in Saunders, Lewis, and Thornhill (1997, p. 349) emphasises the importance of the researcher continually assessing which themes are emerging from the data as it is gathered. Data analysis is an eclectic and iterative process, which occurs simultaneously with data gathering and with interpretation and drafting of the final report (Miles & Huberman, 1994). It involves data reduction and assignment of meaning, which create tensions for the researcher. Locke (2001, p. 85) depicts these tensions as shown in Figure 3.4.
She suggests that they "highlight the importance of analysts being able to contend with and move back and forth between both the subjective and objective aspects of the analytic process" (p. 85).

The data collection processes associated with grounded theory are neither prescribed nor limited by Glaser and Strauss' original work. Glaser and Strauss (Glaser, 1992; Strauss & Corbin, 1990) themselves have diverged in their development of the processes with considerable disagreement about processes and techniques. Whiteley (2002, p. 18) suggests that due to the concerns of Glaser, in particular, the term "grounded research" should not be applied when "the pure grounded theory conditions cannot be met". She argues that there may be something about a business or organisational context which "renders the pure form of grounded theory unachievable" (p. 27). Others, however, suggest that grounded theory is a "practical method for conducting research that focuses on the interpretive process by analysing the "actual production of meanings and concepts used by social actors in real settings" (Gephart, 2004, p. 457). It is the spirit of a grounded approach with key elements of grounding theory building in the day-to-day understandings of the actors which is the essence of the approach undertaken in this study. Understanding and "truth" about the phenomenon under investigation arise from the idea that the actors are informed and knowledgeable about it. Knowledge is seen as actively constructed relative to the world as the actors experience it, and therefore an important aspect of
this is the individual and the social context in which they are operating. Some key elements of the approach include theoretical sampling and the constant comparison methods of data analysis.

3.7.1 Theoretical sampling

Theoretical sampling is a planned, thoughtful approach to selecting who to ask about what. It follows a process of selecting who to seek data from next, not on the basis of who they are but what they are likely to be knowledgeable about in relation to emerging data and evolving theoretical concepts. Often the decision as to where to start is one of the most difficult. Locke (2001) suggests that the commencement of data collection is likely to be informed by the researcher’s own understanding of who might be able to “provide good information on their chosen topic area” (p. 80). She suggests that this initial selection may be referred to as a form of purposeful sampling, and that a principle of comparison be adopted to decide where to commence data collection. Strauss and Corbin (1990) confirm this idea by suggesting that initial sampling decisions depend on a number of factors including where the research question directs that data collection commence, what type of data are to be used, whether the same people are to be followed over time or others are to be included, and issues such as access, time and energy. Locke, Strauss and Corbin, and Glaser all suggest that subsequent sampling is about where to collect data next, and that such decisions should be based on the data which is beginning to be analysed and on emerging themes and evolving theories. The idea that sampling and analysis must evolve as the study unfolds are critical elements in the successful application of grounded theory. Suddaby (2006, p. 634) identifies that theoretical sampling is one of the two core concepts which are the tenets of the separation of grounded theory from positivist approaches, with “the direction of new data collection determined... by ongoing interpretation of data and emerging conceptual categories.”

Theoretical sampling is a data collection process whereby the decisions about where to go next for the collection of data, who to ask and what sort of data to seek are determined by the emergent theory developed by the researcher from what has already been collected. Thus, the process of sampling is part of the iterative concurrent processes of collection and analysis of data.
Glaser (1978) makes a clear distinction between “selective sampling” (where the researcher has determined the sample in advance of the study based on preconceived dimensions) and “theoretical sampling”. The latter refers to sampling where the groups or subgroups from whom data should be collected are selected according to the actors’ involvement in the areas of the research. Sampling is a continuous and ongoing process as categories are derived from data already collected. This concept is further developed by Strauss and Corbin (1990) who discuss relational and variational sampling, and discriminate sampling whereby the researcher aims to verify differences at the dimensional level, and maximise opportunities to verify the emerging concepts and ideas and further explore poorly developed categories.

Six organisations participated in the study. All of the organisations are included in the sample because of their status as volunteer-involving organisations. The selection of organisations was an evolving process and while the emergent theory will be discussed later the key elements which influenced the selection of organisations are identified here.

Agreements were reached with gatekeepers in each about not naming the organisation with an understanding that developing a profile may lead readers to conclude that a particular organisation took part in the study. The profiles offered here are general but offer data which will assist those interested in the research in understanding the types of organisations involved.

The first two organisations were selected due to their particular interest in both volunteering and ageing.

- Organisation 1 – Portfolio organisation: Organisation 1 has a broad portfolio of activities which include volunteer programmes specifically targeting older volunteers. It is in this area of the organisation that data collection took place. Volunteers in this area are involved in education and publicity for the organisation, peer support, recruitment of other volunteers, and development of specific volunteer projects as the need arises. The number of volunteers varies from 10 or so to over 30, depending on the nature and style of the activity, and volunteers move in and out of this part of the organisation into other activities as needed. Some of the volunteers regularly give a number of hours every week, while others work on short term projects, and some volunteer less frequently for longer periods of time. The manager has a portfolio of activities which includes managing and supporting the volunteer programmes, particularly those targeting older volunteers. Other managers manage other portfolios and the volunteers may therefore be managed by more than one person on a particular project or over a period of time. The manager reports to the CEO of the organisation and occupies a full time paid position in the organisation which has between 10 and 20 paid staff and up to 30 volunteers. The organisation is a not for profit organisation which is
governed by a Board of Management drawn from member agencies and individual members. The volunteer positions within the organisation are clearly defined, with job descriptions and orientation programmes offered to new volunteers. Many of the volunteers have been with the organisation for a substantial period of time and are committed and loyal to the organisation. Recent staffing changes in the last few years mean that many of the volunteers have been involved in the organisation longer than many of the paid staff, including the CEO. Management of the volunteers is a high priority in this organisation with evidence that volunteers are highly valued members of staff.

- Organisation 2 – Wellbeing organisation: Organisation 2 has a particular interest in older people and all of its volunteers are involved in programmes aimed at older people or their wellbeing. Volunteers are involved in education and publicity, tutoring of other seniors, research and administration, and other programmes developed as the organisation identifies a specific need. The number of volunteers was reduced significantly when the organisation moved premises, and now hovers at around a dozen. Management of the volunteers is a little ad hoc, partly due to their small numbers. They are considered to be important contributors to the organisation. Some of the volunteers regularly give a number of hours every week, while others work on short term projects. To some degree the day-to-day organisation of client service volunteers falls to another volunteer with reception duties. The manager of volunteers occupies a paid part-time position and is often engaged in duties which are within the purview of the organisation but do not necessarily relate to volunteering. The manager reports to the CEO of the organisation which has a very small number of paid staff. A self-funding, not for profit organisation, it is governed by a board of directors.

Selection of the next two organisations was based on giving consideration to the methodology of asking those who are likely to have knowledge and experience of the phenomena under investigation and who may be representative of the wider community of volunteer-involving organisations. The emerging data from the first two organisations, for which initial data analysis had commenced, indicated that there might be a difference in physical and cognitive decline and so I wanted to make sure the volunteer work in the target organisations included both of these. I selected one organisation which offers an intergenerational programme where the majority of volunteers are likely to be older people due to the nature of the programme and where the activities offered involve mentoring, teaching, counselling and befriending, thus involving primarily cognitive skills. In the other organisation the activities are likely to involve more emphasis on physical abilities.

- Organisation 3 – Cognitive focus organisation: Organisation 3 has grown rapidly over the last few years and now operates interstate as well as locally. The volunteer programme is operated in a region or chapter hierarchy with the head office operating one of those regions and providing support to the other regions. Each region has a voluntary co-ordinator who is often also a front-line volunteer. The programme's main focus is on mentoring for young people. Volunteers
employ both cognitive and social skills in the mentoring process where they need to form relationship with the client in order to focus on the cognitive aspect of mentoring. Two group interviews were conducted in this organisation, one in the metropolitan area and one in a region outside the metropolitan area. Similarly, two interviews were conducted with individuals, one with a paid staff member from head office whose duties include co-ordination and management of volunteers as well as administrative and reception duties, and one with one of the voluntary regional co-ordinators who has also been a front-line volunteer. To some degree the management of volunteers depends on the individual charged with co-ordination and management responsibilities, and volunteers in the metropolitan area found that the level of contact with their co-ordinator varied depending on which regional co-ordinator they worked with. These positions report to the CEO with the regional co-ordinator receiving support in the first instance from the paid staff member as required. The numbers of volunteers are continuously growing in this programme with the number of volunteers having reached 1500 at the end of the 2003/04 financial year. There are only 14 paid staff in the organisation, which has recently expanded interstate.

- Organisation 4 – Physical focus organisation: Organisation 4 is a not-for-profit organisation which offers volunteer services to the elderly, disabled and housebound within the Perth metropolitan area. Those services include gardening, home maintenance, rubbish removal, shopping, transport and home visiting. There is also a social group which meets at the organisation’s premises. Partly government funded (Federal government Home And Community Care programme - HACC), the organisation is a not-for-profit organisation operated by a board of directors. Operating out of more than one location the organisation has 30 paid staff and approximately 160 volunteers. Volunteers undertake duties from home visiting to cleaning gutters, administration and computing to gardening and maintenance, requiring physical capabilities such as strength, stamina and balance. The volunteer manager works full time and her duties are largely focused on managing the volunteer work force who are sometimes operating in a team with a paid or volunteer team leader supervising them.

Data analysis had continued parallel to the ongoing data collection. Two types of organisations emerged as potentially having some differences which might affect the management of volunteers. The first of these is voluntary associations where “everyone's a volunteer” and all management issues, including performance management, become the domain of the management committee. The second is volunteer programmes attached to government organisations, where the organisation may have a better opportunity to fund their programme management, but the lack of centrality of the volunteer programme may have other implications for management.

- Organisation 5 – Voluntary Association organisation: Organisation 5 is a voluntary association with about 120 volunteers. All of the decision making and management is the responsibility of the association which operates to enhance, augment, serve and service a larger organisation. There are many types of voluntary association like this such as hospital auxiliary, school support associations, “friends of” and “supporters of” type organisations across the
tourism, culture, environment and arts sectors. In many of these organisations a partnership or relationship with the larger organisation provides both support in the form of an official structure or framework within which to operate, and tensions about who is the end point for management and responsibility for the volunteers. The programme receives limited funds from the larger organisation but is well supported while maintaining a level of autonomy. Management of the volunteers is the responsibility of the elected committee, including the President, but clients/customers do not distinguish between the larger organisation and the voluntary association, nor between paid staff and volunteers when they have a concern or complaint. In this organisation I interviewed the group of volunteers who have taken responsibility for the management of performance of volunteers in the organisation, the elected President of the organisation, and the person in the larger organisation who has overall responsibility for the relationship between the organisation and the associated voluntary organisations on behalf of the CEO. There is a very strong culture of valuing the volunteers which has emerged in the last ten years or so within the larger organisation.

- Organisation 6 – Government agency: Organisation 6 is a government agency. Volunteers who participated in the study are involved in two of a number of programmes operating out of this agency with about 30 volunteers in each. The manager is a paid staff member with other responsibilities. The volunteer programmes in which participant volunteers are involved are funded by the government to offer education and support and telephone advice line services to the clients and constituents of the agency. The overall agency has a staff of in excess of 1600 people.

At this point it was becoming apparent that while small new issues were still arising in the last two organisations, these were not central to the focal questions posed at the commencement of the study or to the central theme of the management of older volunteers and that saturation was being reached on a number of core categories. There was clear indication beginning to emerge that while the context of these last two organisations was indeed different, the key elements of the phenomenon under investigation were similar across the organisations. The additional two organisations served to provide further information on the nuances of the key elements which had already been revealed, and to provide a clearer picture of the differing realities constructed by the participants in the research. These new organisations had potential to open up completely new lines of enquiry for future research but did not reveal a need to continue data collection beyond this point for this particular study.

It is important at this stage to clarify that despite the range in size, complexity, funding and management structure of these organisations, similar issues were emerging relating to the phenomenon under investigation. The theoretical sampling process operates on the premise that sampling continues until saturation is reached on core categories, and that the researcher must make a judgement as to when new data
categories and ideas are in fact new lines of enquiry, rather than further categories of the phenomenon. This premise was adhered to in stopping at six organisations.

3.7.2 Constant comparison

One of the areas to which Glaser and Strauss and subsequent grounded theory specialists pay particular attention is that of coding and theory generation. Grounded theory is meant to build theory rather than test it and the analytical process is an interpretive process. Constant comparison is the second concept which Suddaby (2006, p. 634) identifies as one of the two core concepts which are the tenets of the separation of grounded theory from positivist approaches. He refers to the simultaneous collection and analysis of data as being in contradiction to “the myth of a clean separation between data collection and analysis”. Most important to this concept is the simultaneous collection and analysis of data.

There has been some disagreement between Glaser and Strauss over the years about certain elements of grounded theory. Glaser appears to emphasise a more creative and less rule laden approach to data analysis, while Strauss has laid down a more linear and prescribed approach. Douglas (2003, p. 48) portrays a key divergence between the two “discoverers” of grounded theory thus: “Glaser (1992) regards Strauss and Corbin’s (1990) analytical method as forcing rather than allowing emergence of theory.” He goes on to suggest that a “Glaser adherent” selects an area or organisation and allows issues to emerge, whereas those following the Strauss and Corbin approach are more focussed on the particular issue at the outset and develop coding around that concern. This view, however, forces the researcher to make a choice between the more prescriptive approach of Strauss and Corbin and the more emergent approach of Glaser. Both approaches are underpinned by one of the key tenets of grounded theory, the emergence of the research processes as part of theory generation. This involves the careful selection of “where to next?” based on what emerges from the data as it is collected and analysed. Progression is both iterative and reflexive resembling a slow moving spiral which moves over the landscape according to the things which emerge from its rotations. This “constant comparison” method is preceded by thematic analysis and several layers of coding commencing with open or in vivo codes. It then moves through a series of layers to more abstract conceptual codes which identify relationships, offering a plausible explanation of that which is
being studied. The final stage is the use of constant comparison for identification of categories which are used for further theoretical sampling of the data, for investigation of the extant literature, and for expansion and elaboration of the developing theory.

The final research design for this study is shown in Figure 3.5. Two components of the research have been discussed here as separate phases: a separate contextual quantitative data gathering phase and the qualitative case study interviews. The separation of these two phases was chronological and the first phase was largely complete before the second phase commenced allowing it to serve the dual purposes of informing both initial sampling and initial interviewing for the second phase. The separation was, however, artificial as the generation of data and the development of theory commenced when the study commenced and the iterative process of data analysis continued throughout the study. All three diagrams which illustrate the research methodology as it developed chronologically are included in Appendix F in a fold out format for reference. The employment of sensemaking as a diagnostic and explanatory tool arose from selective sampling of the literature, and is depicted as a part of the process of analysis. This is discussed shortly.
Emergence of the Research Issue

Initial Literature

- Workshop
- Search and Review

Proposal Development

Instrument Development

Survey of managers

Survey of Seniors

Selection of cases and gatekeeper negotiation

Initial Data Analysis

Instrument Development

Multiple case study data collection

- Group interviews
- Manager interviews
- Document perusal

Intra case analysis

Cross case analysis

Iterative process of exploration, explanation, reflection, theory development

Provisional theory

Employment of sensemaking as a diagnostic and explanatory tool

Central data gathering strategy

Central data gathering

Contextual data gathering

Interpretivist Approach

Figure 3.5: Final research methodology
The approach outlined focuses on how people attach meaning to interpersonal relations and is relevant in the context of examining both perceptions and actions (Blakie, 1993). None of the theoretical assumptions which underpin this approach are in conflict with the overall goal of this research. These assumptions are consistent with the view that the interviewer need not view participants’ responses to interviews, for example, as “simply true or false reports on reality. Instead we can treat such responses as displays of perspectives and moral forms” (Silverman, 1993, p. 107). In this study, where the different understandings of the actors are under investigation, the differing perspectives of participants are an important element of the data gathering process.

3.7.3 Theory building

Abduction

Theory building in this study was enhanced by following a modified version of what is referred to by Blakie (1993) and Ezzy (2002) as an abductive approach. Blakie (1993, p. 176) defines abduction as “the process used to produce social scientific accounts of social life by drawing on the concepts and meanings used by social actors, and the activities in which they engage.” Ezzy attributes the theory of abduction to CS Pierce, identifying that a particular new idea or concept supposed to explain or “understand how a particular event fits into a broader picture”, is considered to be a potential general rule or supposition which is then pursued with further investigation. Ezzy (2002, p. 15) further outlines this approach by indicating that

*Abductive reasoning is an important part of the cycle of theory building and data collection in grounded theory. Abductive reasoning allows for new theories to be developed. However, these theories are then subjected to an ongoing cycle of deductive examination and inductive confirmation through further research and data collection.*

In this approach reality is the world as it is perceived and experienced by individuals who may be considered as “insiders”. Thus, the role of the researcher is to describe and explore the views of the “insiders” and not impose an external, objective or outside view. In this role the researcher is in search of explicit and tacit knowledge, shared mutual understandings of reality and the underlying beliefs, assumptions and meanings of their actions of the insiders. Abductive strategies move the researcher
beyond reporting the accounts of the participants: firstly, towards understanding them in the context of existing theory, and secondly, and possibly more importantly, to the generation and development of new theory. It is in this generation of new theory that the research questions are revisited, and further strategies to pursue them are developed. According to Ezzy (2002, p. 15) “abductive reasoning is prepared to accept a certain level of inconsistency and ambiguity in the analysis” and is part of a complex process of inference, insight, empirical observation and logical reasoning. Blaikie’s (1993) description of the layers in the process of moving from description to theory is shown in Figure 3.6 with the two alternative outcomes shown as parallels.

<table>
<thead>
<tr>
<th>Everyday concepts and meanings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide the basis for</td>
</tr>
<tr>
<td>Social action/interaction</td>
</tr>
<tr>
<td>About which</td>
</tr>
<tr>
<td>Social actors can give accounts</td>
</tr>
<tr>
<td>From which</td>
</tr>
<tr>
<td>Social scientific descriptions can be made</td>
</tr>
<tr>
<td>From which OR and understood in terms of</td>
</tr>
<tr>
<td>Social theories can be generated</td>
</tr>
<tr>
<td>Social theories or perspectives</td>
</tr>
</tbody>
</table>

Figure 3.6: Blaikie’s summary of the layers of the abductive research strategy
Source: Blaikie, 1993, p. 177

The concept of sensemaking in the contemporary discussion by Weick (1995), and Weick et al (2005) and the social construction of reality (Berger & Luckman, 1966) are “social theories or perspectives” within which the data which has been collected is understood. Thus, in this study the “everyday concepts and meanings” provide the basis for the “social action/interaction” about which the volunteers and managers “give accounts”. Those accounts are the basis then from which the social scientific descriptions are made. From these, new “social theories” are “generated” and understood in relation to the social theories and perspectives of sensemaking and social construction.
3.8 **SENSEMAKING AND THE SOCIAL CONSTRUCTION OF REALITY**

In 1966 an important work was published which has formed the basis of sociological understandings of the world and the way we interpret it. *The social construction of reality* (Berger & Luckman, 1966, p. 33) argues that “everyday life presents itself as a reality interpreted by men and subjectively meaningful to them as a coherent world.” In the time since the publication of this work social constructionism has developed as a sociological approach to the understanding of the world. There are a number of approaches to it but there is a common range of key elements which are grounded in the way we communicate with each other and how this helps us to develop a shared understanding of the world (e.g. Burr, 1995; Pearce, 1992). Central to this is the way we experience our world and the communication around which we construct “reality”. The shared understanding we develop is constructed from the way we communicate with each other. The way we understand what is going on becomes embedded in the way we talk to each other. This in turn becomes accepted as “reality” in that particular context, and then guides our understanding of the meanings in our conversations. In other words, what we use to explain what is happening becomes “reality” which in turn guides our actions and becomes part of the “reality”. Finally, the relationships we have and the different contexts we operate in mean that our understanding is shaped and reshaped to accommodate the changes in “reality” and new meanings emerge via the social processes of those relationships.

In the data analysis process it became apparent that the concept of sensemaking could be an important diagnostic and explanatory tool in understanding the data as it was emerging. The concept of sensemaking has been identified as being derived from a diverse range of sources, across a range of disciplines and having developed over a number of years in a contested, debated, complex environment (Weick, 1995; Weick, Sutcliffe & Obstfeld, 2005). Essentially sensemaking is said to take place at all times, but to come to the fore when there is an interruption to the flow of events, either because of an unexpected event, or the non-occurrence of an expected event “in either event the ongoing cognitive activity is interrupted” (Mandler, 1984 cited in Weick, 1995, p. 100). Sensemaking is said to be set apart from understanding, interpretation and attribution by seven characteristics, and it is important to briefly outline these (derived from Weick, 1995).
1. Ongoing – continuous and never complete. We constantly reflect on past actions and events, and while it comes to the fore when there is a trigger, and we then look back more intensely on something which does or does not happen.

2. Retrospective – We look back at what has already happened (or not happened), assessing this in the context of our previous experiences and knowledge of how things “ought” to happen.

3. Based on “extracted clues” – We attend to and extract symbols and cues which are the focus of our sensemaking process, and while we can sometimes not be entirely sure what “clues” triggered sensemaking, we become aware of, and focus on, particular events (or non-events) when a cumulative set of “clues” draws our attention to something in particular.

4. Grounded in identity construction – The process of making sense of a situation is largely influenced by who the sensemaker is and what his or her individual responses are to situations. The sense the individual makes is reflective of our particular knowledge and experiences.

5. Based on plausibility rather than accuracy – We construct reasonable explanations rather than conducting scientific exploration to find the accurate answer or “the real story”.

6. Enactive of sensible environments – By deciding what has happened and then taking action, the sensemaker is participating in the sensemaking process to create the environment for future action.

7. Social – This involves sharing viewpoints and exchanging ideas with others, or at least consideration of the fact that the action which is generated will need to be understood and implemented in a way that works with others.

Interestingly, Weick (1995, p. 18) identified these seven characteristics as being a rough guide “more like an observer’s manual or a set of raw materials for disciplined imagination …[rather than] a tacit set of propositions to be refined and tested.”. Despite this, subsequent researchers have tended to cite these as the basis of all understanding of the concept (e.g. Coopey, Keegan, & Emler, 1997).

Weick (1995) identified three elements which trigger more focussed sensemaking – a frame, a cue and a connection – with frames often being past moments of socialisation (where you find out what to expect) and the cue being present moments of experience (where what you expect does not happen or another event that is unexpected does happen). The connection of these two is the third element which is the trigger or event which activates the “occasion for sensemaking”. Thus, as individuals we are constantly experiencing our world and our experiences help us to build an understanding where we learn what to expect and develop our set of understandings about how the world works and how we fit into it. This is our
"frame". Within that frame, we collect and accumulate cues. In one scenario something that we expect to happen does not—and our sensemaking subconscious recognises this within the frame we have developed. An example of this might be that the clock which chimes regularly is noticed not because it chimes (because in your frame it chimes all the time) but because it has not chimed.

Conversely, in another scenario something unexpected happens, and the same recognition occurs. An example of this might be that your car starts easily every time you turn the key and you pay little conscious attention to it, not really thinking about how the turning of the key makes the car start, but when the turning of the key does not start the car you pay attention to the how of starting the car. It is important to note that the sensemaking may not be a dramatic event which takes place (although it can be), and that it may be that a series of cues accumulate and are bracketed and grouped by the sensemaker who notices the variance from their frame by the accumulation of cues. Returning to the clock example, you may not notice that it did not chime just then but after a while you realise that you have not heard it for a while. Similarly with the car example you may have noticed that the car was a little harder to start one morning, or that it was sluggish, but the fact that you “noticed” this did not come to the forefront until there was an accumulation of things. Even if the car does not fail to start, the variance in the performance of the car triggers increased sensemaking. This trigger to increased sensemaking is referred to as an interruption—it interrupts the flow of continuous sensemaking which takes place in the background all the time as the sensemaker goes about daily life and causes the sensemaker to focus on the interruption. Sensemaking, as has been mentioned, occurs all the time in the background, but once an interruption is experienced what is known as an “incipient state of sensemaking” occurs (Weick et al., 2005. p. 411). The sensemaker considers the accumulation of those things which have been noticed and bracketed or grouped, adding to this accumulation and drawing on a range of resources available to them for the next stage of sensemaking which is about labelling, categorising, creating order, and working out “what’s going on here?” Once they have a plausible explanation for what is going on they move on to “what action is needed?”

An example provided by Weick, Sutcliffe and Obstfeld (2005) further explains this. The example provided is that of a nurse who draws on her experience as a neonatal nurse to notice and brackets a series of cues which indicate to her that the baby
in her care is not well. There is no dramatic downturn in the baby’s condition, and the
doctor may have been early in the day and noticed nothing out of order, but the
nurse’s sensemaking is increased by the trigger of her accumulation of little things
which her experience tells her are not quite right. Noticing the variance in the baby’s
condition is based on experience and the understanding of the world which the nurse
has acquired, and the “mental models” she has developed over time. The frame and
cues together trigger increased sensemaking on the part of the nurse. This trigger is
referred to as an “interruption”. She asks herself the question “what’s going on here?”
and then “what action is needed?”. In this case she seeks additional help for the baby.
Once again the decisions about what action to take are based on experience (some of
which comes from training).

The importance of the past experiences of the sensemaker is highlighted by the
story of the nurse. The greater our experience the less likely it is that we will come
across something that we have not experienced before, and therefore our expectations
are increased as to what should or should not happen, thus triggering an “interruption”
when our expectations are not met, either by the occurrence or non occurrence of a
particular set of cues. The inexperienced, however, will also experience an
“interruption” when what they expect does not occur, or the unexpected occurs. What
is likely to be different here is the interpretation of “what’s going on here” and
decisions about “what action is needed” will draw on a different frame. So the
experienced or trained nurse draws on that experience or training to seek support for
the baby. On the other hand the inexperienced nurse may still notice and bracket
changes and draw on training to seek help for the baby but this process may be
slower, or it may be that the decisions about what action to take are based on a
knowledge of procedure rather than on a knowledge of what has worked in the past.
The experienced nurse may, in fact, take action which is outside the prescribed
procedures if experience suggests that there are shortcuts which will produce faster
results.

As was discussed in the literature review, social constructionists influenced by
the seminal work of Berger and Luckman (1966) argue that there is a shared
understanding which develops within and between people which influences thinking
and behaviour and creates a shared reality. When considered alongside sensemaking
the context in which the “interruption” is considered and interpreted by the individual
or the sensemaker draws on the stored conscious and unconscious knowledge which they have accumulated by their past experience, including the shared understandings they have with others and with society, and including those which they have acquired by training, education and learning. The socially constructed reality is therefore part of the environment in which the sensemaker experiences the interruption which triggers sensemaking.

It is important to note that Weick (1995) also identified that sensemaking can be classified into a series of levels: intrasubjective (individual), intersubjective (between individuals), generic subjective (across the group) and extrasubjective (symbolic, institutionalised). Management, it might be argued, is about shaping the intrasubjective understandings into intersubjective and generic understanding which enable there to be continuity in the group despite changes in group membership. Training and learning can also be seen to be part of this process. Training, passing on elements of knowledge which allow the learner to accumulate an understanding which is not experienced directly by the individual in the normal course of events, is a tool which can aid the sensemaking process for the individual. Collective understanding of events or processes can be aided by training, but can also be developed by acculturation within an organisation or group. Weick (2001, p. 9) develops the idea of sensemaking within organisations as a social activity where the sense we make as individuals is compared with that made by others and altered to create a shared understanding of the events surrounding us. He uses map making as an analogy to describe the making and remaking of reality where sensemakers try to “carve out a momentary stability in this continuous flow” (Weick, 2001, p. 9).

A further important concept is the relationship between sensemaking, emotion and the “interruption” to flow. Emotion or “arousal” is said to be part of that which leads to the search for answers, that is, the more focussed or increased sensemaking. Weick discusses the idea that emotion is what happens between the time at which the interruption occurs and action results in flow continuing (either in the same or a new direction). Magala is cited (by Weick, Sutcliffe & Obstfeld 2005, p. 418) as highlighting emotion as an important “lost opportunity” in Weick’s (1995) extensive examination of sensemaking. In reflecting back on the managers who identified that what they saw as declining performance due to age may be a problem, part of the reason for the “problem” may be the emotional attachment between the manager and
volunteers, or the emotional involvement of the managers in their jobs. Evidence in this study, however, suggests a further contribution of emotion, that of the emotional responses involved in engaging with the event or interruption, the sensemaking process and the action which results. There is also evidence of “denial” of decline and some fears associated with addressing it. This will be discussed in Chapter Six.

A final aspect of sensemaking which is important to this study is part of the “what action is needed?” stage of sensemaking. Weick (1995, p. 12) discusses the instantaneous nature of sensemaking which takes place by referring to the idea that often the sensemaker is unaware that sensemaking has taken place. He phrases this “how can I know what I think until I see what I say?” illustrating that the sensemaker does not necessarily laboriously engage step by step in the sensemaking process of what is going on here, and what action is needed, but more that there is an instantaneous (and continuous) flow of sensemaking, and that this can be simultaneously operating while the sensemaker is acting. In the case of conversation this is “how can I know what I think until I see what I say?” In the case of problem solving this might be termed “how do I know what I think until I see what I do?” This creates an iterative loop between sensemaking and action. The action which is taken produces results. Those results may be expected or unexpected and thus may lead to further increased sensemaking responses, further questioning about what is going on and further decision making about action. It may be that the action taken is innovative or creative if the sensemaker is seeking to produce different results to those already experienced (Coopey, Keegan, & Ennler, 1997).

The current study employs the concept of sensemaking as a tool for explanation of the processes which take place when a manager encounters the event or events of perceived declining performance in an older volunteer—the phenomenon under investigation—and in turn contributes to understanding about sensemaking by exploring its interaction with the emotional responses of the managers, and the context in which this particular occasion for sensemaking occurs. The employment sensemaking as a diagnostic tool was a process which emerged from the data itself as it was apparent that the managers of volunteers were seeking answers to the interruptions they experience when they perceive declining performance in an older volunteer.
3.9 SUMMARY

This chapter has provided a chronological illustration of the two-phase exploration of the perspectives of the actors in relation to the issue of involving older volunteers, particularly when it is apparent that there are changes occurring in their performance. It has outlined the methodological underpinnings and the research processes adopted for this study. Of key importance is the match between the phenomenon under investigation, and the paradigm, ontology, epistemology and methodology selected. The research questions have been outlined and the emergence of an additional question identified and discussed. The methodological underpinnings of the approach and processes used have been identified and discussed. Conducted within an interpretivist paradigm, the two phases of data collection, survey methods and in-depth interviews, have been demonstrated to be appropriate for investigating the research problem. Finally, the adoption of sensemaking as a diagnostic tool has been discussed and its relationship to the interpretivist approach identified. The next chapter reports the results from the surveys conducted in Phase One of the study.
ORGANISATION OF THE THESIS

Chapter One
Introduction
Managing older volunteers:
A subject for study

Chapter Two
Literature Review -
Older volunteers and volunteering

Chapter Three
Methodology
Research questions and approach

Chapter Four
Results Phase One
Establishing context

Chapter Five
Results Phase Two
Voices and viewpoints

Chapter Six
Findings
Synthesis and interpretation of results

Chapter Seven
Conclusion
Implications and the future

129
CHAPTER 4  RESULTS PHASE ONE – ESTABLISHING CONTEXT

4.1 INTRODUCTION

This chapter highlights some key points from Phase One of data collection for this study. The first section reiterates some key elements already discussed in the literature review and methodology chapters. The second reports highlights from the results from the questionnaires distributed to a sample of member organisations of Volunteering Western Australia for completion by the manager or co-ordinator of volunteers. These are followed by the highlights of the questionnaires distributed to 500 older people who were registered with the Positive Ageing Foundation Research Group. The results are then discussed in the next section with reference to the different perspectives of the actors. Finally some of the hunches derived from this phase are discussed, as is their relevance to the next phase of data collection, and to the data analysis process.

As has already been foreshadowed this chapter only reports the essence of this phase of data collection, and highlights those elements which later emerged as important for the expression of the context in which volunteering takes place for older volunteers. Tables and figures representing the bulk of the data collected in this phase are presented in Appendix C at the conclusion of this thesis. More detailed and in-depth data about the context in which volunteering takes place for older volunteers was gathered in Phase Two of the data collection process and this topic is returned to later when methodological gains are discussed.

4.2 SEEKING CONTEXTUAL DATA

As has already been outlined, the first phase of data collection for this study was carried out with the intention of providing contextual information for the next phase of data collection. The paucity of specific information about the management of older volunteers in Western Australia, accompanied by uncertainties in the ABS and other statistical information available, meant that it was difficult to develop a context for the research at the outset. The identification of the topic of managing older volunteers in earlier research into the use of feedback led to a belief that this is an issue requiring further examination, particularly from the perspectives of the actors.
Accordingly, in this phase as well as the next, an interpretivist approach influenced the data collection and analysis. As has been discussed, the sampling process involved asking those who are likely to know. Similarly, the data collection process included provision of opportunities for respondents to inform the researcher beyond the parameters set out in the questionnaires by including some free response questions with no pre-determined categories or scales. Further, the statistical analyses conducted were basic descriptive statistics with only limited inferential analyses being conducted. In addition, only limited coding of the free response data is reported in this chapter. Some of the free response data was included in the coding and analysis undertaken in the next phase of data collection.

4.3 SURVEY 1 – MANAGERS

As reported in the previous chapter, 45 usable responses were received from a sample of 100 organisations which were members of Volunteering Western Australia. This section reports on some of the key findings, in particular, those which contributed to the findings of this research. As has already been reported the sample was drawn from a variety of organisations with a majority in the community welfare sector. The numbers of volunteers involved in the organisations ranged from very few to just under 2500.

4.3.1 Respondent profile

Of the 100 questionnaires a total of 45 usable responses were returned. This represents a 45% return rate. Respondents were asked to indicate the type of work in which their organisation is primarily involved. Categories provided were based on the organisation type categories developed by ABS (2000) and reported by the Department of Premier and Cabinet for Western Australia (2001). Thirty-two respondents selected one option for type of work, two failed to indicate what type of work they are involved in and 11 indicated more than one type. The majority of the respondents indicated involvement in community/welfare work (21 – 46.7%), while none of the respondents indicated religious work as their primary involvement. Figure 4.1 sets out the data in a pictorial format. It is evident that the greatest number of responses came from community/welfare type organisations followed by health and
education/training/youth organisations. This is consistent with the ABS data reported in the literature review, although the proportions are somewhat different.

![Figure 4.1: Respondent organisations – Organisation type](image)

**Identifying older volunteers**

Respondents were asked to indicate the numbers of volunteers involved in their organisation, and how many of these were over 55. The numbers of volunteers in the various organisations ranged from one organisation with two to three volunteers at any one time to two with over 4000. Of the total of 45 organisations, two organisations had no volunteers over 55 years of age, and one had 3000 volunteers over 55. Many respondents indicated that they do not record this information, providing responses such as “do not record this info”, “?” and “don’t know”, an indication of the low priority placed on keeping such records.
The responses to this question were expressed in many different ways including specific numbers and estimates such as "50/50" recorded by respondents. Where possible these were converted to percentages. Nine respondents did not provide details of numbers of volunteers 55 and over. Of the remaining 36, eight had up to 25%, seven had 26% to 50%, 11 had 51% to 75% and eight had 76% to 100% of their volunteers in the 55 and over age group. As previously stated, only two organisations reported having no volunteers in that age group.

Organisations were asked to offer approximations of the numbers of volunteers in various age groups. An aggregated view of this is presented in Figure 4.3. Looking at the categories of ages, only six organisations had any volunteers aged 85 and over. (Total number of volunteers in this age group = 39 people). Figure 4.3 sets out the total number of volunteers reported in each age group.
Given that the literature suggests that "older volunteers" can be as young as 55, a large number of the volunteers about whom managers were answering questions (total 11,510) could be classified as "older" (4984 – just over 43%). These figures are consistent with the ABS statistics reported earlier and similarly it can be predicted that this group, often classified as baby boomers, are entering a phase of retirement from paid work and will have changing needs as volunteers as they age.

4.3.2 Responsibility for managing volunteers

Over 75% of the responses came from organisations with a paid person undertaking the co-ordination and management of volunteers. Generally, the organisations with 100 or more volunteers have a paid person in the manager or co-ordinator's position, but one organisation with over 200 volunteers had an unpaid volunteer with other duties in this role, and one organisation with over 2000 volunteers has a committee member with this responsibility. Five organisations with over 100 volunteers have a paid officer with other duties undertaking the volunteer management/co-ordination role.

The workload of the volunteer manager or co-ordinator, and also the low level of pay received by paid staff in these roles, has been the subject of some discussion in the literature (e.g. Carlsen, 1989; Dartington, 1992; Paull, 2002). Volunteer managers are said to carry a greater workload in supervising the same number of Full Time Equivalents (FTEs) as their counterparts who are supervising paid staff, due to the
nature of volunteer work. A supervisor of 100 paid staff positions (FTEs) is likely to have less part time and casual staff who are not in the workplace on a regular basis, and has the option of rostering those paid staff to cover the working week (whatever that maybe). A supervisor of the equivalent amount of FTEs is likely to have a large number of volunteers who volunteer on a small scale, maybe half a day once per week or even less, and a core group of volunteers who volunteer more regularly and for longer (Lyons & Hocking, 2000).

Twenty (44.4%) of the respondent organisations require specific qualifications for the person appointed to the position of volunteer manager or co-ordinator. The volunteer managers and co-ordinators who responded to the survey indicated a wide variety of qualifications and experiences including degrees in Human Resource Management, management and community service qualifications, a degree in environmental management, teaching qualifications, and a military administrative background. Five (or 11.1%) had undertaken the Certificate IV training in volunteer management, and a further four indicated specific experience in the volunteer sector. There did not seem to be a correlation between qualifications and responses relating to management of performance of volunteers.

4.3.3 Strategies and policies

Official policies for managing volunteers have been developed by 77.8% of the respondent organisations. Of these, 18 (40%) have strategies which are specifically focussed on age factors. These organisations may be the ones which reported collecting data on ages. The specific strategies reported include lowest age of volunteers, and retirement of older volunteers. Only two organisations have a policy against age discrimination, and this comes from having a general anti-discrimination policy. These two are part of larger organisations where the policy is an organisation-wide policy and not just restricted to the volunteer programme.

Given that one of the reasons cited by organisations for requiring quality performance from volunteers, and that in the UK research into age discrimination has revealed that insurance was one of the reasons for terminating the service of older volunteers, a question was included in the organisational survey on insurance cover for volunteers. No organisations indicated that they carried no insurance, while only five or 11% indicated that they held all five types of insurance listed: personal
accident, motor vehicle, fidelity, directors and office bearers, and public liability. The majority (42.2%) carried only two types of insurance, with most of these being personal accident and public liability.

Insurance is a grey area with many organisations having different types of policies and arrangements which provide different levels of cover. When asked if the policies placed restrictions on volunteers aged 55 and older the results are somewhat confusing: 26 (57.8%) said no restrictions applied, and eight (17.8%) said they did not know. In response to the question seeking details as to what age any restrictions began to apply, 17 (41.5%) were able to identify this, with the highest number (6, 13.3%) being at age 80.

The survey was conducted during a period in which the whole issue of insurance was in a time of transition. Public debate about rising premiums and risk management was coupled with legislative changes including volunteer protection legislation, and with government arrangements relating to police clearances for volunteers being investigated. Volunteer protection legislation protects the volunteer and increases the burden on the organisation to follow best practice risk management procedures (McGregor-Lowndes, 2003).

Seven respondent organisations have a policy not to recruit volunteers above the age specified by their insurance. “Client safety”, “duty of care” and “prevention of accident or injury, and protect volunteer” were amongst the responses to the question about the reasons for the policy not to recruit above the age specified by insurance.

A series of questions designed to follow up whether the age related restrictions specified by insurers had lead to restrictions about work performed being placed on volunteers lead to the conclusion that 11 (24.4%) specifically implemented restrictions associated with age, 26 (57.8%) did not, and 8 (17.8%) responded “don’t know”. Whether these restrictions lead to a loss of volunteers was unclear with the responses to this question not being able to be reconciled with the responses about restrictions. This confusion may be attributed to the lack of time available to the manager to implement such restrictions, or to the lack of focus placed on the volunteer programme in the organisation. There may be other causes but the lack of clarity is a factor which can be considered to contribute to understanding the context in which volunteering is taking place.
4.3.4 Training

The ability volunteers to carry out their work may be affected by the receipt of sufficient training to enable them to do so. Volunteer training in respondent organisations was varied. Table D.1, included in Appendix D, sets out the responses relating to training for volunteers. More than 95% of respondents offer on-the-job training to their volunteers, and only two (4.4%) did not specify. Over 75% offer orientation or induction training, and over 70% offer regular training.

One added comment indicated that training was dependent on the type of volunteer tasks assigned. The majority of respondent organisations are offering training to their volunteers in one way or another. Some organisations require significant induction or orientation programmes, with suitability for the volunteer work being assessed during this phase.

Thus the respondent profile indicated a reasonably wide selection of organisations with varied numbers and differing numbers of older volunteers. The evidence is that the organisations which responded to the survey include managers of varying qualifications and experience, and with a range of strategies and policies in place with regard to the age of their volunteers. Training is conducted in most organisations, particularly on commencement.

4.3.5 Managers' views on older volunteers

Respondents were asked to indicate "yes", "no" or "don't know" to a series of questions about their experience with older volunteers. The categories were derived from the work of Williams (1995) in South Australia, and were to provide data on what managers generally thought based on their experience. Table D.2 in Appendix D sets out the results relating to those questions. Generally, managers (91%) disagreed with the statement that volunteers aged 55 and over on average stayed less time than younger volunteers, and that they volunteer less hours than younger volunteers (87%). Just under half (42%), however, agreed with the statement that older volunteers require less support than younger volunteers, and just over half (53%) agreed that older volunteers require less supervision than younger volunteers. Two-thirds (64%) disagreed that older volunteers require less training than younger volunteers, and three-quarters (76%) disagreed that older volunteers adapt to change more easily than their younger counterparts. This data was compared with data obtained from
volunteers on the same question, and this is discussed later in this chapter (see Table 4.14).

Overall managers and co-ordinators do not think that older volunteers stay less time, volunteer less hours or require less training than their younger counterparts. There are mixed opinions about whether they require less supervision and support, and generally older volunteers are not seen to adapt to change more easily than younger volunteers.

4.3.6 Declining performance

In response to the direct question as to whether they had encountered difficulties with declining performance due to age with any of their older volunteers, 23 (51.1%) said “no”, and 19 (42.2%) said “yes”. Two did not respond to this question and one replied “not yet – will happen eventually”.

Further information was sought on the level of difficulty this posed for organisations. Table 4.1 sets out the responses to this question.

**Table 4.1: Degree of difficulty of declining performance due to age**

<table>
<thead>
<tr>
<th>Degree of difficulty</th>
<th>Number of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major problem</td>
<td>2 (4.4%)</td>
</tr>
<tr>
<td>Minor problem</td>
<td>6 (13.3%)</td>
</tr>
<tr>
<td>Occasional problem</td>
<td>13 (28.9%)</td>
</tr>
<tr>
<td>Rarely a problem</td>
<td>11 (24.4%)</td>
</tr>
<tr>
<td>Not a problem at all</td>
<td>10 (22.2%)</td>
</tr>
</tbody>
</table>

At first this data seemed to indicate that the “problem” being investigated may not exist in the way that had been identified in preparation for this study. As the study progressed anecdotal evidence and interview evidence, however, indicated that managers did not see it as an overwhelmingly frequent problem or one which they had to deal with in great numbers, but more that when it occurred it was both time consuming and stressful.

A series of cross tabulations, chi square tests and ANOVAs were undertaken to see if any initial relationship between degree of difficulty and a range of other variables on which data were collected should be further investigated. No pattern was detected when degree of difficulty was tested with:
• number of volunteers;
• percentage of volunteers over 55;
• type of work;
• type of organisation;
• on the job training levels;
• orientation and induction programmes;
• experience of manager or co-ordinator; and
• training/qualifications of manager or co-ordinator.

The question then arises, what is it about these situations where problems are encountered that is different to those organisations reporting that declining performance due to age is not a problem at all. Questions arise such as:

Is it a matter of interpretation on the part of the manager?

Does the interpretation relate to the performance of the volunteers, or to the size and scope of the problem?

Is the interpretation of the manager relating to the problems of declining performance associated with age a product of the culture of the organisation as has been suggested in earlier research relating to the use of feedback to manage performance by volunteers (Paull 2000)?

If so, are there elements in the management style which contribute to that culture?

These questions will be returned to later in this thesis.

The organisational survey also sought free response data on the advantages and disadvantages of involving older volunteers. More general free response data was gathered by use of the opportunity for respondents to comment generally on older volunteers in volunteer-involving organisations. This is reported later in this chapter.

4.3.7 Advantages of involving older volunteers

Respondents to the organisation survey were asked to identify the advantages of having older volunteers in their organisation. Some of the responses identified what the manager or co-ordinator saw as advantages to the volunteers themselves including
keeps their minds alert (M²)
retains their interest (M)
keeps them active (M)

enables them to look after themselves for longer periods (M)
provides motivation to achieve (M)
enables them to continue to communicate and mix with their peers (M)
in their sharing with other grandparents which in turn supports their children and grandchildren (M)

Others identified the advantages for organisations:
dedicated, committed, reliable (M)
knowledge – especially historical knowledge of our organisation (M)
experience with one adding especially of cycles, trends (M)
contact – networking, key people (M)
clarity of purpose – awareness of what and how to give (M)
time and availability (M)
generosity of spirit – willingness to share, especially with younger staff/volunteers (M)

mature volunteers bring their previous training, job skills and life experiences to the role of volunteer. Most people have improved time management skills as they mature (M)
they can relate to our members who are of the same age or older (M)
tend to have more patience with callers (M)

The advantages reported are consistent with the literature and with the previous research, for both the volunteers and the organisations.

² A convention adopted for this thesis is the use of (V) to indicate Volunteer and (M) Manager as the source of a verbatim quote.
4.3.8 Disadvantages of involving older volunteers

Free response data from the organisational survey on the disadvantages of involving older volunteers identified

*supervision* (M)

*rosters need to be made clear* (M)

*tasks may be limited for some groups* (M)

*sometimes resistance to change* (M)

*challenges in language/understandings – this isn’t really a disadvantage but a reminder not to use jargon and to clarify understandings* (M)

*younger students like to work with younger volunteers at least some of the time* (M)

*avoid using computers* (M)

*health concerns cause absenteeism* (M)

Three organisations specifically indicated “none” in response to this question.

Clearly, there was inconsistency between organisations as to the benefits and difficulties associated with involving older volunteers, but the reasons for difficulties being experienced in some organisations and not others are not so clear. Two of the organisations which indicated “none” had very few older volunteers, while the other had older volunteers as the majority of its volunteer workforce. We now turn to looking at the perspectives of older people on volunteering.

4.4 SURVEY 2: OLDER PEOPLE’S PERSPECTIVES

As was discussed in the previous chapter, the assistance of the Positive Ageing Foundation was sought in sending out 500 questionnaires to a sample of the over 4500 on their database. The distribution of these across age groups, genders and postcodes was undertaken to try to achieve a range of responses from the different groups. Of the 235 people who responded to the survey, 169 identified themselves as active volunteers. The anomaly here was discussed in Chapter Three, but in keeping with the framework and approach of this study, self identification as a volunteer is the criteria adopted in this study.
4.4.1 Respondent profile

Demographics

Table 4.2 sets out a profile of respondents to the survey from which a total of 232 useable responses were received, representing a 46% response rate.

Table 4.2: Profile of respondents

<table>
<thead>
<tr>
<th>Gender</th>
<th>Female 114 (49.1%)</th>
<th>Male 97 (41.8%)</th>
<th>Unspecified 21 (9.1%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australian born</td>
<td>Yes 121 (52.2%)</td>
<td>No 107 (46.1%)</td>
<td>Unspecified 2 (0.9%)</td>
</tr>
<tr>
<td>English as first language</td>
<td>Yes 206 (88.8%)</td>
<td>No 20 (8.6%)</td>
<td>Unspecified 6 (2.6%)</td>
</tr>
<tr>
<td>Active volunteer</td>
<td>Yes 164 (70.7%)</td>
<td>No 61 (26.3%)</td>
<td>Unspecified 5 (2.2%)</td>
</tr>
</tbody>
</table>

Table 4.3: Respondents to older volunteer survey – gender by age group

<table>
<thead>
<tr>
<th>Age group</th>
<th>Gender</th>
<th>Male</th>
<th>Unspecified</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-54</td>
<td>Female</td>
<td>6</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>1</td>
<td>0</td>
<td>20</td>
</tr>
<tr>
<td>55-59</td>
<td>Female</td>
<td>16</td>
<td>1</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>3</td>
<td>0</td>
<td>42</td>
</tr>
<tr>
<td>60-64</td>
<td>Female</td>
<td>17</td>
<td>2</td>
<td>42</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>23</td>
<td>0</td>
<td>53</td>
</tr>
<tr>
<td>65-69</td>
<td>Female</td>
<td>32</td>
<td>2</td>
<td>53</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>19</td>
<td>1</td>
<td>43</td>
</tr>
<tr>
<td>70-74</td>
<td>Female</td>
<td>17</td>
<td>5</td>
<td>35</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>21</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>75-79</td>
<td>Female</td>
<td>16</td>
<td>1</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>18</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>80-84</td>
<td>Female</td>
<td>3</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>5</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>85+</td>
<td>Female</td>
<td>5</td>
<td>2</td>
<td>13</td>
</tr>
<tr>
<td>Unspecified</td>
<td>1</td>
<td>11</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Total</td>
<td>114</td>
<td>97</td>
<td>21</td>
<td>232</td>
</tr>
</tbody>
</table>

The profile of respondents has its limitations when viewed from a functionalist point of view. The sampling frame is a database of people who have indicated they are willing to participate in research. The representation of people from non-English speaking backgrounds is low, and only three people have indicated they are of Aboriginal or Torres Strait Islander descent. That being said, a response rate of 45% is
considered to be good, and people who are willing to become informants on the topic in question are considered to be valuable sources of data.

**Volunteer rate**

Of the 235 respondents, 169 indicated that they are active volunteers, and 66 indicated that they are not currently active, thus making the volunteer rate amongst this group 72%. This is higher than the rate for the population of Western Australia in the ABS data. The different question is likely to elicit a different answer from the perspective that this instrument asked respondents if they considered themselves to be active, whereas the ABS interviewer tells the respondent the ABS definition of voluntary work, shows the respondent a list of organisations and then asks if the respondent has done any unpaid voluntary work for “organisations such as these” in the last 12 months. In this instrument the respondent’s own definition of “active volunteer” is applied in the answer. It is interesting then that all of the people who are registered on the PAF database as willing to participate in research, and particularly those who have taken the time to respond, might be considered to be “active volunteers”, thus illustrating the lack of clarity in identifying and defining volunteers as discussed in the literature.

**4.4.2 Former volunteers**

Those who did not consider themselves to be active volunteers were asked to indicate whether they had previously been a volunteer, and if so what had made them stop, or if not, why this might be the case. Of 66 people who did not currently consider themselves to be an active volunteer, 39 indicated that they had previously volunteered. Their reasons for stopping varied, with respondents sometimes selecting more than one option. Table 4.4 sets out the numbers of responses to each of the reasons offered. Two respondents provided more detail as to why they stopped, with the one respondent who indicated they were asked or told to, writing “group closed”, and one of those who selected “personal situation” added that they had taken up a role minding grandchildren.
Table 4.4: Reasons for stopping volunteering

<table>
<thead>
<tr>
<th>Reason</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable to get there</td>
<td>5</td>
</tr>
<tr>
<td>Health</td>
<td>10</td>
</tr>
<tr>
<td>Personal situation</td>
<td>16</td>
</tr>
<tr>
<td>Moved away</td>
<td>7</td>
</tr>
<tr>
<td>Asked/told to</td>
<td>1 (group closed)</td>
</tr>
<tr>
<td>Not satisfying</td>
<td>7</td>
</tr>
<tr>
<td>Not sure</td>
<td>2</td>
</tr>
</tbody>
</table>

Evidence from elsewhere, discussed in the literature review, is that people move away, or are no longer able to drive, or suffer from ill health, meaning that they can not continue their volunteer activity (Fischer & Schaffer, 1993; Forster, 1997). This data is consistent with some of the data gathered in the second qualitative phase of data collection. Personal situations included becoming a full time carer for an ill family member (spouse); taking on minding “the grandchildren” (former volunteer respondent); and “cost became too high” (former volunteer respondent). This last is consistent with a recent campaign by Volunteering Australia to draw attention to the rising costs of volunteering (Costs of Volunteering Task Force, 2006). Those who had never volunteered were also asked to indicate why this might be the case and this data is included in Appendix D.

4.4.3 Active volunteers’ experience

169 respondents indicated that they considered themselves to be active volunteers. The volunteers who responded had performed volunteer work for up to 120 hours in the previous month. The mean was just slightly less than 22 hours in the month. Based on the idea that there may be a pattern associated with age groups and hours volunteered, a one-way ANOVA was conducted to determine if there is a relationship between hours volunteered last month and age group, but no significant results were found.

The types of organisations in which the volunteers were involved included all the categories offered, with some volunteers ticking up to five options. Table 4.5 indicates the number of respondents who said they volunteered in these types of organisations.
Many of the other organisation types identified by respondents would have fitted into the ABS classification of the organisation types above, but respondents did not select the category. The resulting data is, in fact, more informative than the statistical data, with the organisation types ranging from aged care accommodation to amateur theatre, and weeding to management consulting. As has been discussed earlier the categories were selected for comparison with the ABS data on volunteering in Western Australia. It is clear from the responses which people placed in “other” that they did not feel comfortable assigning their activity to a broad category, even when it could fit there. It might be speculated that this is because voluntary work does not easily fit into categories. For example, a number of volunteers indicated that their volunteer work was with an aged care facility which could easily fit with all but the education/youth/training category. Then it becomes apparent that one of the volunteers has an educational/training role in an aged care facility. In addition some volunteers selected more than one category. One observation to be made here is that as with the majority of the organisations who responded to the organisation survey being community/welfare type organisations, a high proportion of volunteer respondents came from similar organisations.

Volunteers were also asked to indicate the type of volunteer activity they undertake (Table 4.6). Once again the ABS categories were used to allow comparisons to be made, and respondents were asked to tick as many as applied.
Table 4.6: Volunteer responses about activity type

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration/clerical/recruitment</td>
<td>64</td>
</tr>
<tr>
<td>Coaching/refereeing/judging</td>
<td>11</td>
</tr>
<tr>
<td>Performing/media production</td>
<td>20</td>
</tr>
<tr>
<td>Befriending/supporting/listening/counselling</td>
<td>59</td>
</tr>
<tr>
<td>Fundraising/sales</td>
<td>48</td>
</tr>
<tr>
<td>Preparing/serving food</td>
<td>24</td>
</tr>
<tr>
<td>Transporting people/goods</td>
<td>37</td>
</tr>
<tr>
<td>Repairing/maintenance/gardening</td>
<td>22</td>
</tr>
<tr>
<td>Management/committee work/co-ordination</td>
<td>66</td>
</tr>
<tr>
<td>Personal care/assistance</td>
<td>21</td>
</tr>
<tr>
<td>Teaching/instruction/providing information</td>
<td>51</td>
</tr>
<tr>
<td>Other</td>
<td>39</td>
</tr>
</tbody>
</table>

Once again volunteers did not necessarily allocate their activity to an ABS category, choosing instead to insert a label into the “other” activities category. Activities listed included:

- Sewing for op shop (V)
- Playing scrabble (V)
- Conducting surveys (V)
- Child minding (V)
- Writing [name of organisation deleted] history (V)
- Caring for wildlife (V)

Activities also included functions which might be seen as fitting into some of the categories offered, such as:

- Shop assistant (V)
- Op shop (V)
- Patient service (V)
- Child minding (V)

It might be speculated that this is because voluntary work does not easily fit into categories, or that the volunteers themselves don’t want to be put into categories.
The same categories were used to have volunteers indicate which activity they devoted the most time to (Table 4.7).

Table 4.7: Volunteer responses about most time devoted to activity type

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration/clerical/recruitment</td>
<td>45</td>
</tr>
<tr>
<td>Coaching/refereeing/judging</td>
<td>8</td>
</tr>
<tr>
<td>Performing/media production</td>
<td>12</td>
</tr>
<tr>
<td>Befriending/supporting/listening/counselling</td>
<td>42</td>
</tr>
<tr>
<td>Fundraising/sales</td>
<td>22</td>
</tr>
<tr>
<td>Preparing/serving food</td>
<td>10</td>
</tr>
<tr>
<td>Transporting people/goods</td>
<td>20</td>
</tr>
<tr>
<td>Repairing/maintenance/gardening</td>
<td>12</td>
</tr>
<tr>
<td>Management/committee work/co-ordination</td>
<td>43</td>
</tr>
<tr>
<td>Personal care/assistance</td>
<td>15</td>
</tr>
<tr>
<td>Teaching/instruction/providing information</td>
<td>34</td>
</tr>
<tr>
<td>Other</td>
<td>33</td>
</tr>
</tbody>
</table>

On the basis of these responses the three highest ranking activity groups in terms of time are administration/clerical/recruitment, management/committee work/co-ordination, and befriending/supporting/listening/counselling.

In view of the response pattern discussed above, it is clear that one of the shortfalls here is that the ABS data collection involves an interview, where the allocation of particular types of work to the relevant category can be guided by the interviewer, whereas this questionnaire was completed by respondents away from the person seeking the information. Guided responses can, however, remove the individuals' perspectives about their volunteer work in the recorded information. It is clear that many of the volunteers preferred not to classify or categorise their volunteer activity according to the predetermined categories.

4.4.4 Getting involved

With motivation to volunteer being one of the most researched topics in volunteering, the motivations of volunteers were explored. The respondents to the questionnaires often first became involved in volunteering for more than one reason. Five reasons were included in the questionnaire based on the literature, and a further free response category was offered. Table 4.8 sets out the reasons respondents first became involved in volunteering.
Table 4.8: Reasons for first involvement

<table>
<thead>
<tr>
<th>Reason</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knew someone involved</td>
<td>33</td>
</tr>
<tr>
<td>Someone asked me</td>
<td>44</td>
</tr>
<tr>
<td>Self involvement in organisation</td>
<td>68</td>
</tr>
<tr>
<td>Saw advertisement/report in media</td>
<td>17</td>
</tr>
<tr>
<td>Found out about it myself</td>
<td>49</td>
</tr>
<tr>
<td>Other</td>
<td>20</td>
</tr>
</tbody>
</table>

The evidence here is that after being already involved somehow in the organisation or finding out about it themselves, being asked by someone was the biggest reason for taking up volunteer activity. This is consistent with the philosophy prevalent in volunteering circles that word of mouth is a very important recruiting tool, and that media advertisements and reports are less effective tools for recruitment. Other ways people first became involved included "friend suggested it (V)", "saw the need (V)", "attended talk (V)" and "needed outlet for my skills (V)". As was discussed in the literature review the reasons for first involvement may not be the reasons that people continue to volunteer.

4.4.5 Current reasons for volunteering

Given that the evidence in the literature is that people's reasons for volunteering change over time, respondents were asked to indicate their current reasons for volunteering. Respondents selected up to nine current reasons for being a volunteer. Table 4.9 sets out responses to this question.

Table 4.9: Current reasons for involvement

<table>
<thead>
<tr>
<th>Reason</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal/family involvement</td>
<td>26</td>
</tr>
<tr>
<td>Personal satisfaction</td>
<td>120</td>
</tr>
<tr>
<td>Social contact</td>
<td>61</td>
</tr>
<tr>
<td>Religious beliefs</td>
<td>31</td>
</tr>
<tr>
<td>To be active</td>
<td>88</td>
</tr>
<tr>
<td>To learn new skills</td>
<td>25</td>
</tr>
<tr>
<td>To do something worthwhile</td>
<td>110</td>
</tr>
<tr>
<td>Help others/community</td>
<td>120</td>
</tr>
<tr>
<td>Gain work experience</td>
<td>2</td>
</tr>
<tr>
<td>Use skills/experience</td>
<td>71</td>
</tr>
<tr>
<td>Felt obliged</td>
<td>8</td>
</tr>
<tr>
<td>Just happened</td>
<td>12</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
</tr>
</tbody>
</table>
Of the five other reasons offered by respondents a number could be assigned to the categories already provided. The five "other" reasons were "it has to be done (V)", "no-one else volunteers (V)", "providing pleasure for others (V)", "keep physically/mentally active (V)" and "empathy (V).

4.4.6 Satisfaction and feelings about volunteering

Active volunteer respondents were asked how satisfied they are with their volunteering over the last 12 months. On a 5-point Likert scale with 1 being very satisfied and 5 being very dissatisfied a mean score of 1.58 with a standard deviation of .806 indicated that of the 169 respondents who answered that question overall most were satisfied with their volunteer experience. Examination of the frequencies indicated that only four were dissatisfied, two of those very dissatisfied, and only 16 selected a neutral central response.

Respondents were then asked a series of questions about their own volunteering experiences. Once again a 5-point Likert scale was used.

Table 4.10: Feelings about volunteering

<table>
<thead>
<tr>
<th>Range</th>
<th>Mean</th>
<th>SD</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1.32</td>
<td>.584</td>
</tr>
<tr>
<td>2</td>
<td>1.28</td>
<td>.570</td>
</tr>
<tr>
<td>3</td>
<td>4.15</td>
<td>1.198</td>
</tr>
<tr>
<td>4</td>
<td>1.57</td>
<td>.925</td>
</tr>
<tr>
<td>5</td>
<td>4.44</td>
<td>1.007</td>
</tr>
<tr>
<td>6</td>
<td>2.58</td>
<td>1.336</td>
</tr>
<tr>
<td>7</td>
<td>3.56</td>
<td>1.344</td>
</tr>
<tr>
<td>8</td>
<td>1.59</td>
<td>.851</td>
</tr>
</tbody>
</table>

The responses to these questions give an overall picture of the volunteer respondents' views about their volunteering experience (Table 4.10). There was strong disagreement with the statement "I feel I am getting too old", but a one-way ANOVA showed a significant relationship with agreement with this statement, but post hoc testing showed that the homogeneity assumption had been violated thus the population variances for each age group could not be considered to be equal. Nonetheless, the general disagreement with the statement was an interesting result. The other statement about which there was considerable disagreement was "I worry
about my ability to do the work” with the mean being 4.15 but the SD on this was a little greater. Interestingly, some people who completely disagreed with the statement about getting too old completely agreed that they worry about their ability to do the work, possibly indicating a worry for the future which has not yet arrived.

4.4.7 Particular areas of dissatisfaction

Volunteers were asked to offer their views about areas of dissatisfaction with their volunteer work. Those who responded to this part of the questionnaire provided some insights into areas which may not necessarily be confined to being “older” but might illustrate that some managers are not in tune with the needs of older volunteers.

For example, one volunteer responded

*Aspects of dissatisfaction*

(i) Being thanked seems a bit difficult to do
(ii) Being treated as an adult/individual is sometimes hard for some managers
(iii) Using the name of the volunteer as opposed to “love”, “dear”, “flower”, “blossom”, would be a distinct improvement. (V)

And another

*Too many want too much for nothing and some are plain bloody ignorant. (V)*

The first of these includes a concept which emerged as important in the second phase of data collection, that of the manner in which the manager or supervisor interacts with the volunteer, and the at times patronising approach taken by some – treating the older person as if they were a child. The second, which is also about recognition and appreciation, reflected a concept of respect which also emerged as important in the second phase of data collection.

4.4.8 Expectations for the future

Respondents were also asked to indicate whether they thought they would volunteer more less or about the same in five years time (Table 4.11). Fourteen respondents added in “not at all” or a similar response, and one did not respond to this question. The majority, however, indicated that they would expect to be volunteering about the same as they do now.
Table 4.1: Expectations for five years time

<table>
<thead>
<tr>
<th>Response</th>
<th>Frequency</th>
<th>% of active volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td>More</td>
<td>20</td>
<td>11.8</td>
</tr>
<tr>
<td>Less</td>
<td>33</td>
<td>19.5</td>
</tr>
<tr>
<td>Same</td>
<td>101</td>
<td>59.7</td>
</tr>
<tr>
<td>Not at all</td>
<td>14</td>
<td>.08</td>
</tr>
<tr>
<td>Not specified</td>
<td>1</td>
<td>.005</td>
</tr>
<tr>
<td>Total</td>
<td>169</td>
<td></td>
</tr>
</tbody>
</table>

When asked to provide reasons for intending to volunteer in the future 99 different reasons were offered, with some of the 103 respondents to this question offering up to eight reasons they would continue. These included many of the current reasons for volunteering already discussed such as enjoying the work, social contact, using skills, and doing something worthwhile, and encompassed a wide range of ideas about the importance and benefit of volunteering:

Table 4.12A: Reasons for continuing to volunteer

<table>
<thead>
<tr>
<th>Free Response</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>No reasons why not (V)</td>
<td>Can see no reason to stop</td>
</tr>
<tr>
<td>I'm in facility anyway (V)</td>
<td>Can see no reason to stop</td>
</tr>
<tr>
<td>Lack of govt action (V)</td>
<td>Community need</td>
</tr>
<tr>
<td>People locked out of human services (V)</td>
<td>Community need</td>
</tr>
<tr>
<td>Very worthwhile project (V)</td>
<td>Community need</td>
</tr>
<tr>
<td>Organisation purpose remains viable (V)</td>
<td>Community need</td>
</tr>
<tr>
<td>Will retire, have more time (V)</td>
<td>Keep active</td>
</tr>
<tr>
<td>To achieve a reasonable age (V)</td>
<td>Keep active</td>
</tr>
<tr>
<td>I am good at it (V)</td>
<td>Skills</td>
</tr>
<tr>
<td>I enjoy meeting people (V)</td>
<td>Social contact</td>
</tr>
<tr>
<td>Friendships (V)</td>
<td>Social contact</td>
</tr>
<tr>
<td>Pass on skills, experience (V)</td>
<td>Succession</td>
</tr>
<tr>
<td>Train successor (V)</td>
<td>Succession</td>
</tr>
<tr>
<td>Difficult to find replacement (V)</td>
<td>Succession</td>
</tr>
<tr>
<td>See club survive (V)</td>
<td>Succession</td>
</tr>
</tbody>
</table>

Such reasons show commitment to the task, to the organisation and to the people as well as the benefit obtained from volunteer activity as was described in the literature review.
The main reasons people felt that they might not volunteer in the future are shown in Table 4.12B.

**Table 4.12B: Reasons for ceasing to volunteering**

<table>
<thead>
<tr>
<th>Response</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>declining health (V)</td>
<td>Health</td>
</tr>
<tr>
<td>ill health (V)</td>
<td>Health</td>
</tr>
<tr>
<td>too old (V)</td>
<td>Health/Age</td>
</tr>
<tr>
<td>being deceased (V)</td>
<td>Health</td>
</tr>
<tr>
<td>unable to get there (V)</td>
<td>Mobility/transport</td>
</tr>
<tr>
<td>somebody may PAY me !(emphasis in original) (V)</td>
<td>Financial</td>
</tr>
<tr>
<td>financial (V)</td>
<td>Financial</td>
</tr>
</tbody>
</table>

There was less variety amongst these reasons although a similar number of people answered this question (n=101).

**4.4.9 Volunteers’ experiences of being managed**

At the core of the relationship between the organisation and the volunteer are the views of both parties. Just as organisational representatives were asked about their attitudes/perceptions of older volunteers based on their experience, the older volunteers were asked about their experience of volunteer-involving organisations (Table 4.13).

**Table 4.13: Experience re volunteer-involving organisations**

<table>
<thead>
<tr>
<th>Statement re older volunteers</th>
<th>Yes</th>
<th>No</th>
<th>don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cater for</td>
<td>112</td>
<td>21</td>
<td>37</td>
</tr>
<tr>
<td>Discriminate against</td>
<td>8</td>
<td>117</td>
<td>42</td>
</tr>
<tr>
<td>Support and encourage</td>
<td>125</td>
<td>9</td>
<td>31</td>
</tr>
<tr>
<td>Value</td>
<td>130</td>
<td>7</td>
<td>28</td>
</tr>
<tr>
<td>Treat same</td>
<td>128</td>
<td>16</td>
<td>26</td>
</tr>
<tr>
<td>Offer opportunities not elsewhere</td>
<td>68</td>
<td>25</td>
<td>75</td>
</tr>
</tbody>
</table>

Older volunteers who responded to this survey were largely positive about their experience of volunteer-involving organisations but as can be seen from the table above there was a small amount of concern on a number of matters – this includes eight respondents who felt that organisations discriminate against older volunteers.
(4.7% of respondents to this question) and a further two who said "sometimes". The number of "don't know" responses indicates that volunteer-involving organisations are not necessarily sending negative messages, but that perhaps they could send stronger positive messages. This is an area for further exploration and the relationship between the volunteer and the organisation (or the manager) became an important factor in the data analysis in the next phase of data collection.

4.4.10 Volunteers' views on older volunteers

Respondents were also asked their opinions on the same sets of questions asked of organisation representatives regarding their experience of volunteers aged 55 and older. In keeping with the Williams (1995) study they were asked to respond "yes", "no" or "don't know" to the same set of six statements which had been put to the organisation representatives in the organisation survey reported earlier. The findings are included in Table 4.14 adjacent to those of the managers (reported earlier and repeated in Table 4.14) under "Organisation responses" to enable comparison of the views of volunteers and managers.

4.4.11 Comparison of perspectives

When looking at the comparison between organisation responses and individual active volunteer responses on the statements on experience with volunteers aged 55 and older there is generally agreement on most dimensions between the organisation representatives and the active volunteers.
The evidence from these responses is that volunteers are less emphatic in their disagreement that older volunteers stay less time, both groups agree that older volunteers do not volunteer less hours, and volunteers are slightly more inclined to think that older volunteers require less supervision. There is less consistency in responses to the statements about the requirement for support, about training and about adaptation to change. Organisational respondents (managers or co-ordinators), tend to believe, on the basis of their experience, that older volunteers do not require less support than their younger counterparts, that they do not require less training and that they do not adapt to change more easily. These differences, even where the volunteers responded “don’t know” to the statements, tend to indicate that there are areas where there could be more discussion to explore the different views, and to discuss the uncertainties.
4.5 GENERAL FREE RESPONSE DATA – BOTH SURVEYS

The most revealing information about the views of volunteers and managers tended to come from the free response section at the conclusion of the questionnaires. All of the free response data was included in the analysis for the second phase of the research.

4.5.1 Organisational perspective

In the organisation survey there was limited information – mostly notes about how valuable research is for volunteering.

*volunteering is always an area that can be worked on* (M)

about how little time people had to fill out the questionnaire (possibly reflecting the workload of managers)

*this has sat in my in tray for too long sorry, co-ordinators have so many demands on their time* (M)

offering positives about their organisation and volunteers

*the organization 'practices and preaches' the strengths perspective. The philosophy of the organization, reinforced thru' induction and ongoing forums, is to be inclusive and highly values volunteers* (M)

*Our organization would not be able to continue providing services to the community without volunteers. They are the backbone of what we do* (M)

Small comments throughout the survey (rather than in the free response section) applied to particular questions such as a comment on

*have concern when unable to perform duties safely* (M)

about the abilities of older volunteers; and

*Self exclude physical demand* (M)

to further explain why some volunteers might leave the organisation.

4.5.2 Older peoples’ perspectives

Of the respondents to the questionnaire distributed to older people 142 wrote comments at the end of the questionnaire (61%). Many respondents wrote lengthy responses, with some even including a letter to me. A selection of these is presented in a table in Appendix D (Table D.19) with recurring themes and topics emerging in
an initial coding of these responses. Only those areas where more than one response was coded have been reported with the initial NVivo coding. Initial themes which emerged at this stage were: concerns about generational differences, attributes of older volunteers; reasons for volunteering, satisfactions of volunteering, assumptions made about the abilities of volunteers, insurance, fears and concerns, including barriers to volunteering such as decreased mobility and financial barriers, training, and retiring older volunteers. One volunteer included a comment on the value of the research:

_You are doing valuable research and I wish you success (V)._

The free response data was included for further analysis in the coding of the second phase of this study. Some of the data which was collected in this phase was only highlighted as important once the same issue began to emerge in the second phase. An example of this is succession. Another issue identified at this early stage—generational differences—became less important as the more in-depth data was analysed.

### 4.5.3 Shared understandings and differing views

It is apparent from the data collected in this preliminary phase that there was a convergence of views of managers and older volunteers regarding the advantages and disadvantages of older volunteers, but that there are also areas which reflect differences of opinion. Managers, for example, recognise the value provided by older volunteers in terms of their experience, wisdom, available time and patience. They also recognise that volunteering provides benefits to the individual volunteers in terms of quality of life, self-esteem and health. Volunteers, on the other hand, identify that they can derive satisfaction out of volunteering, and that their contribution is valuable and (mostly) appreciated.

Of the 45 respondent organisations, 23 indicated that they experience a problem with declining performance amongst their volunteers, although only 10 suggested this was not a problem at all. The anecdotal evidence which sowed the seeds for this research suggested that part of the problem was not the numbers of volunteers with declining performance but the dilemma which faces the manager of volunteers when such a situation arises, and the amount of time managers feel they have to devote to managing such a situation carefully.
Older volunteers themselves recognise many of the issues facing organisations and many have commented on the issues such as eyesight, mobility, frailty and short-term memory loss. They appear to be more concerned, however, with barriers to continuing volunteering such as transport and financial costs. Some of the free response data indicates a concern about succession into their volunteer roles, while other data indicates that there are assumptions made about older volunteers which frustrate them. Some volunteers report that their organisation reorganises their work to accommodate ageing, whereas others complain that this does not happen.

4.5.4 The context for further investigation

The aim of the preliminary data collection phase was to establish a contextual framework for the case study phase. To this end a number of preliminary findings emerged.

- There was evidence that the declining performance of volunteers is cause for concern for some organisations.
- There is little evidence of there being a relationship between the size of the organisation or the number of older volunteers, or even the proportion of older volunteers and the size of the "problem" as perceived by the manager or co-ordinator of volunteers.
- It may also be that some of the views/values/perceptions held by the manager contribute to the view that there is a "problem".
- It may be that the attitudes of some of the volunteers contribute to the "problem".
- Some older volunteers report that their organisations modify jobs and tasks for older volunteers and others don't.
- Some older people have elected not to volunteer at present due to illness, or incapacity.
- Some older people express dissatisfaction with the way their work is managed or organised.

The relationship between the way the volunteers are managed and the benefits/disadvantages may align with the two extremes identified by Pearce in her book where she contends that very formalised or very loose management will create better management and performance outcomes in the organisational behaviour of volunteers (Pearce, 1992).

Alternatively, it may have more of a relationship to the findings of the earlier research conducted into the use of feedback to manage performance:
Regardless of the systems in place it is the culture or climate, the psychological contract and the existence of a nurturing relationship which makes for management which is seen by the volunteers to be effective. However it may also be that where the "nurturing relationship" exists is where the manager or co-ordinator actually experiences the dilemma about managing a declining performance situation due to their caring about their volunteers. Maybe the manager who does not have such a relationship with their volunteers would not experience or recognize the dilemma (or at least not experience the emotions associated with it) (Paul 2000).

4.6 SUMMARY AND CONCLUSIONS

While this preliminary data collection phase has provided some contextual data about the older volunteers in volunteer-involving organisations, it has not shed a great deal of light on the phenomenon under investigation – the area of concern identified by managers in the previous study. This phase of data collection served to illustrate that the managers and older volunteers do have differing perspectives on some aspects of their relationship. Some of the areas flagged by this phase of data collection increased in their importance as the study progressed but their importance was not highlighted by the data collected in this phase. An example of this is the data collected on the feelings of the volunteers when they believed that they were being treated as children. Similarly, some of the areas which emerged were confirmed by the later data collection, but in turn were not central to the final outcome. One example of this is the subject of succession. One of the reasons volunteers don’t let go of their volunteer activity may be tied to their views on who will do the job when they are no longer able, but the problem of succession planning is beyond the scope of this study. Finally, the fact that some volunteers choose to withdraw from volunteering due to ill health, or recognition of their own changing capacity was flagged in this phase and became important in the next.

Methodologically, the decision to posit this study in an interpretivist framework was confirmed by this phase of data collection. The need to seek more in-depth understanding of the views of the actors has been highlighted and, as will be seen in the chapters to follow, the sensemaking processes experienced by the actors plays a role in the management of performance where this is seen to be affected by age.
ORGANISATION OF THE THESIS

Chapter One
Introduction
Managing older volunteers:
A subject for study

Chapter Two
Literature Review -
Older volunteers and volunteering

Chapter Three
Methodology
Research questions and approach

Chapter Four
Results Phase One
Establishing context

Chapter Five
Results Phase Two
Voices and viewpoints

Chapter Six
Findings
Synthesis and interpretation of results

Chapter Seven
Conclusion
Implications and the future
CHAPTER FIVE  RESULTS PHASE TWO – VOICES AND VIEWPOINTS

5.1 INTRODUCTION

In this chapter I have presented the actors’ points of view; the volunteers and the managers and other individuals who participated in this study, in particular in the interviews and group interviews which took place in the six case study organisations. As has been discussed in the methodology chapter, a hallmark of the interpretive approach is the revelation of the way the participants create and recreate their understanding of their world and make sense of the events which take place within it. The key to the methodology is the dialogue which takes place with the researcher and with other participants, where mutual knowledge and shared understanding are created through a circular process (discussed in Chapter Three).

The organisations and the actors have been introduced in Chapter Three. Six organisations were selected on the basis of the emerging themes and issues, and these ranged in size and focus as described in Section 3.7.1. The volunteers and managers who participated in the individual and group interviews similarly ranged in experience and background and as discussed previously are all experienced and knowledgeable about volunteering and older volunteers.

As also discussed in Chapter Three, an additional research question became important in the collection and analysis of data:

Emergent question: What is meant by “older volunteers”?

In a broad sense managers and volunteers have shared understandings on what older volunteers bring to the organisation and what they get out of volunteering. From the actor’s point of view they agree that there is no definite category of “older volunteers” that can be identified and pigeonholed, but that those who are generally seen to be older volunteers bring important qualities to organisations, and gain satisfaction from their volunteer efforts. These elements contribute to an understanding of the context in which managers and volunteers are experiencing the management relationship. While this, and data on the more general understanding of context, is reported later in this chapter, this first section considers the actors’ viewpoints on the more focussed question of “what is meant by older volunteers?”
In particular, it reveals some discomfort experienced by volunteers about being labelled, and with making sense of being old. It also reveals how important volunteering is to the volunteers. These elements are reflective of issues discussed in the literature review, namely the categorisation of age and older volunteers, and the reasons and motivations of volunteers. They also demonstrate the processes associated with sensemaking where the individual constantly makes and remakes their understanding of the world and attempts to make sense of what is happening around them.

5.2 WHAT IS MEANT BY “OLDER VOLUNTEERS”?

5.2.1 “Older than who?”: Volunteers on “older volunteers”

There was considerable discussion in all the group discussions about the terminology “older volunteers”. Responses were varied about the application of a label in such an identifying way. It was very apparent that a variety of interpretations of “older” were in play. People tried to offer alternative labels and in some cases were shot down by their fellow participants as the alternatives were seen as less palatable. For example, the idea of “aged volunteers” put forward by one volunteer was met with snorts of derision from others in the same group interview. In another there was discussion about “senior volunteers” being those who had been with the organisation a long time, or who were more senior in terms of authority:

*in charge so to speak (V)*

In some discussions volunteers seemed happy, and even proud, to be referred to as older volunteers; in others they did not.

*You can use mature and mature age people, or senior volunteers (V)*

*if I’m old, you know, I know what age I am...and it’s just a number and older I am older than the other person and younger, he’s a younger volunteer...where do I put age? (V) [note the hesitation of the speaker]*

*Where is it younger and where is it old? ...older and old, it’s an open-ended situation (V)*

One volunteer was somewhat dismissive of the discussion of the term older volunteer:

*Just call it over 50 (V)*
In one group, although almost all the volunteers appeared to be over 55, there was a collective sense that we were talking about someone else:

*maybe over 70 or so (V)*

with one volunteer referring to a group of even older volunteers in another volunteer setting as:

*the real oldies, about eighty or so (V).*

Others were not keen to make any delineation or distinction on the basis of age:

*I don’t see why it is really necessary to discriminate at all, I mean, why have that division anyway? (V)*

*It’s not as if it’s useful to call them anything (V)*

One volunteer asked:

*What do you mean, over 50? I mean it’s just a number anyway? I know someone who is in their eighties who is not, not old (V)*

to which another replied

*yes and there are 30 year olds who are definitely old [laughter] (V)*

There was discussion about who was older without reaching an end point or agreement about who are older volunteers:

*older than who? (V)*

was asked in one group discussion and

*were we ever called young volunteers? (V)*

in another.

The volunteers made light of age, and introduced humour during the discussions, in a way dismissing the socially constructed concept of “older” and ageing, and at the same time diverting discussion from what may be a sensitive subject.

5.2.2 “Older than me”: Managers on “older” volunteers

Managers more readily identified a chronological age for “older” volunteers, and in relation to their own age:

*I’d look at an older volunteer to be over 65, over paid employment retirement age, that’s what I’d look at being an older volunteer (M)*

*I guess retired (M)*

*Oh, you know, 60 plus (M)*
from a 60 years plus manager:

*Older than me [laughter] (M)*

and from a manager where the focus of the organisation is on ageing:

*Well we say 50 or 55 here, we're about older people aren't we (M)*

In all the interviews managers moved fairly quickly to descriptions of the qualities older volunteers brought to the organisation:

*They're experienced and knowledgeable and have life experiences and you know (M)*

or to changes in their capabilities

*I am thinking sort of 65 and over, because I don't see them as old or they don't come across as being old prior to that, but they are a little bit dodderly after about 65, or 70, but we have got volunteers who are 70, and 80, and 90.*

rather than identifying an age at which a volunteer is "older". This move to describing behaviours and other characteristics was reflected in all the manager interviews. In the discussion chapter the concept of "older" is considered to contribute to the socially constructed environment in which volunteers are being managed and their performance scrutinised.

In one group, who were already experienced at discussing changes in performance (discussed later) one volunteer offered a reference to Shakespeare's "seven ages of man" (*As you like it* Act II, Scene VII, Line 139 "All the world's a stage"), when the group was discussing "declining" performance associated with age. In the same discussion, perhaps the most powerful and least demeaning image of the stage of life which is associated with changing capabilities was offered by one volunteer who is a musician who indicated that in an orchestra a period of change in abilities of a musician such as this research explores is referred to as "waning powers".

*I like the expression 'waning powers' it's used in the musical world if your second trombone or first trumpet starts to get below par it's picked out and he is then given counselling or whatever or he is told he will have to be deferred and they're removed and the phrase is 'waning powers' I know all about it although I am not personally in a symphony orchestra. I don't know where it comes from it is certainly used in the musical world.*

Others in that discussion responded:
It's quite nice (V)
Logical (V)
Isn't it (V)
It's quite a nice phrase (V)

Many groups referred to volunteers who might be considered to have waning or waned powers as "elderly", a label applied in contradiction to the reluctance to be referred to as "older" themselves. What was interesting is the hushed respectful tone adopted by many of the interview participants to use this term. This was not during the discussion about terminology, but something which developed over the course of the conversation. The propensity to apply labels and classify or categorise people is at once a tool for shared understanding and part of the social construction of the environment in which the actors are operating. This is returned to later.

5.3 WHY VOLUNTEER?

As was illustrated in the quantitative data chapter, volunteers have many and varied reasons for taking up volunteering, and for continuing to volunteer. Those reasons are part of understanding the characteristics of the volunteers who participated in this study, and also link the overall context in which their volunteer activity takes place with the individual volunteers and their managers.

5.3.1 Keeping active and "young"

The passion with which volunteers talk about their volunteer activities and experiences is evident when they talk about what they do, and when the volunteers talked about what they do the circle of why they volunteer and the satisfaction they get from their volunteering became apparent. The concept of volunteering as an antidote to ageing was strong in the data.

There are a range of reasons the volunteers who participated in this study volunteer:

I wanted to make sure I kept active (V)

It keeps you young doesn't it (V)

One of the volunteers, when talking about staying active and busy, said:

Better to die with your boots on than doing nothing (V)
One offered a reason for doing that:

*You'll end up with Alzheimer's disease or whatever, and it's the same if you sit on your backside all day, you'll end up becoming old. But if you don't and you are active and you diversify what you do, and it means that if you volunteer say two days a week, go out and do something else - like I do archery, and I do baby sitting - and that means that I've got a completely different set of days, that you know I don't do the same thing all the time.*

Volunteers' reasons for taking up volunteering in the first place included doing something with their time:

*I didn't do anything for about 12 months and then somebody mentioned that I could actually do something like that.*

There was strong agreement in the group interviews about how they got into volunteering. In one group this was because a particular person asked them to

*and all of a sudden I got another phone call from the gentleman sitting alongside me who said would you like to come in and do this?*

and others in the group joined in with "me too" and "that's just like me". The word of mouth, someone-asked-me pattern continued across many of the group interviews but was most prevalent in the organisation which runs an intergenerational programme:

*When I retired I had a couple of years, doing a bit of travelling and then I got a phone call from a lady called [name deleted] - this person was present at the group interview] [giggles].*

The volunteers who had been a part of the establishment of their volunteer programme had called on a lot of personal contacts to establish their programme, and the pattern of recruiting through personal contacts had continued. Conversely, in the organisation with physical labour as part of its volunteer activity, newspaper advertisements and referral from other places had been a common pattern. One volunteer reported seeking voluntary work which was aligned with his skills and interests:

*Well I can't work any more and I was getting bored. I'm not real good with computers, so I kept looking in the paper and then I noticed volunteers for the gardening, and I love gardening and I've always played sport, and outdoors.*

It is interesting to note here that the individual mentions not being able to work any more, separating volunteering from "paid work".
5.3.2 Satisfaction and hope

The reasons that people choose to volunteer are not static, nor do they stand alone, and when asked why they volunteer the responses varied between individuals, and yet remained the same. The satisfaction derived from volunteering is often expressed by volunteers in relation to either the contribution they make, or the fact that they are actively engaging their skills and knowledge:

*Now you don't do it because you think, I don't think, I don't do things because I think I am doing a service or anything like that I do [it] because I want to do it, that way I contribute.*

*[It] is the enjoyment of doing, and irrespective of what sort of ...of what work you do, I think, it's nice to be able to step out.* (V)

*And you are expanding yourself, all the time, and when you come home you might be tired because your age is catching up – you might not be sleeping too well but you get the satisfaction from it.* (V)

Volunteers talked a lot about the satisfaction they get when they volunteer. They talked of the pleasure they derive from milestones in the work that they do, and the feeling of positive self worth gained from continuing to help others:

*It gives me hope to see the results we can get.* (V)

Volunteers mentioned having activities which occupy their time:

*and I'm also secretary of a club, a pretty big club and that keeps you fully occupied* (V)

and the extra satisfaction which comes from volunteering over paid employment:

*But you get more satisfaction out of it...if you are not doing it for money* (V)

Once again the comparison with paid work is evident.

Volunteering provides volunteers with social networks and opportunities for meeting people, also reported by volunteers as a means of keeping active:

*You are meeting other people. You have been talking to other people and it keeps you in circulation, keeps the mind active. All these factors make us better volunteers too.* (V)

Some were even more emphatic about the role of volunteering in their lives:

*I don't know what I would do if I didn't have that [identifier deleted] to go to.* (V)
and like the others have enjoyed literally every moment of it and would be reluctant to give it up. (V)

5.3.2 Passionate involvement

It was not only the words which expressed the passion of the volunteers for the work that they do. Their demeanour, their willingness to talk about their work, their stories and anecdotes about successes and achievements, and the good camaraderie around the table in the group discussions is not fully expressed in the transcripts of the discussions except perhaps for notes such as [much laughter]. As a subjective researcher I was able to engage with the groups, and I felt during the discussions (and I was able to recall the feelings in listening to the tapes again) that the volunteers are passionate about what they do:

There is an atmosphere of affinity and togetherness here. Maybe it’s the different role, but it’s pleasant, it’s enjoyable, and it’s very satisfying because there’s an opportunity to assist people who sometimes don’t really need very much assisting, but other times perhaps to a greater extent. So it’s a very nice, collective, happy organization in my opinion with wonderful people that I have. (V)

The reasons for continuing to volunteer were also echoed and repeated throughout the interviews with personal satisfaction ranking up there with a desire to help others and, in fact, creating a full circle by achieving both at once and one because of the other. One volunteer summed up one manifestation of this:

I had a noble gesture of helping someone. I went away on a camp with some disabled kids, and in all sincerity they helped me. I was absolutely knackered at the end of the week. They helped me, that really opened my eyes. I had this noble gesture of before I went, but gee they were so far out in front. This is what it is all about, you know, and they actually helped me. (V)

Phrases such as:

I really like to see the look on their [clients] faces (V)

Yes! We love sitting with the [clients] (V)

I enjoy seeing the people (V)

It makes me feel like it’s worthwhile (V)

You get a good feeling (V)
I think that most of my life I have volunteered at some darn thing or other and enjoyed every moment of it (V)

are illustrations of the level of satisfaction derived.

In one group the beneficiaries of the volunteer effort are members of the public rather than direct clients of the organisation, but there volunteers derive satisfaction from being able to impart information and represent their organisation:

I just love it (V)

yes, I do too (V)

5.3.3 Life changing experiences

Managers reflected an understanding of some of the reasons and satisfactions volunteers derive from volunteering:

There are those who basically want to help in the community. They've got nothing to do, they are bored, they are tired. They just want something to do to feel that they are part of the community still. And some people just want to give something back, they feel they have had quite a blessed life and feel that it would be nice give something back. (M)

But a lot them they find that once they get into it and they make friends and that sort of thing it's a great thing to do, you know, stops you worrying about your own problems [laughs] to a certain extent. (M)

It is interesting here that the managers are contrasting volunteers lives to what their life would be without volunteering.

One manager reported that induction or introduction to the volunteer programme promoted the personal satisfaction to the volunteer as a selling point:

It's just that you go through the programme, you know, and you instil in them this thing, you know, that it's worthwhile - getting up in the morning and that sort of thing [laughs] and you know - it does change their lives, they say it's true. (M)

The correspondence between the views expressed by the managers and those of the volunteers (above) indicates that the volunteers communicate their reasons for volunteering to their managers, and that the managers are aware of the motivations and satisfactions of the volunteers.

For some of them it's their whole life, they don't have a family or job, and we are it for them, so we have to be aware of that you know. (M)

There are one or two who don't do anything else. (M)
One manager saw this as a potential trap:

*They’re so happy to come and do whatever you want them to. You have to be careful not to take advantage sometimes.* (M)

Thus the subsidiary research question of who are “older volunteers” opened up exploration of the perspectives of the actors on ageing and older people, and facilitated exploration of the reasons older people have for volunteering, both those voiced by the volunteers themselves, and those ascribed to them by managers.

### 5.4 THE OLDER VOLUNTEER–MANAGER RELATIONSHIP

Now that the data which addresses what was considered to be an emergent element of question three - the background question - has been considered, we turn to the first two key questions which are the focus of this study.

**Question 1:** What are the ways management of older volunteers are experienced by volunteers and managers in volunteer-involving organisations in Western Australia?

**Question 2:** What are the experiences of managers and older volunteers when a manager perceives that an older volunteer’s performance is declining due to age?

First we consider the management of older volunteers and the perspectives of both the managers and volunteers on the relationship between managers and volunteers.

### 5.5 MANAGER VIEWS ON MANAGING OLDER VOLUNTEERS

Prior to considering the experience of managers and volunteers in the management of older volunteers, this study offered quite a lot of data which illustrated the nature of the role of the managers themselves. Key themes/issues in the data included the time pressures and workloads of the managers, and the pressures to perform and maintain high standards in the volunteers’ performance.

All the volunteer managers interviewed are relatively time poor:

*I’m only part time here, you know* (M)

*I’m not only the co-ordinator, you know, I’ve also got responsibility for [name of programme not involving volunteers]* (M)

*So, up in the office you have all the different sections, they have people who decide to do this, someone answers the phone, someone does this, I do everything down here* (V+M)
and extremely busy in their roles:

I also answer every call that comes in so I am extremely busy so really the only time I get to place volunteers is after hours. (M)

with heavy workloads:

I mean I am the volunteer co-ordinator, but that's falling a lot now to, they are all picking up the flag because I'm hardly here any more, you know, I mean I've got three talks in the next four weeks. (M)

You're sort of always conscious of what you should do and shouldn't do, oh I didn't get that done... or I'm a week behind with that. (M)

They experience high demands in terms of the quality of the volunteer programmes:

Service they provide has to be exceptional so it can be memorable. (M) [in partner organisation]

Their role as an ambassador is extremely important and so when they go, they have to be well informed, they have to be presentable, they have to be well spoken, all of those sorts of expectations. (M) [in partner organisation]

The clients will be quick to complain if it's not what they want. (M)

Management want to know it's working. (M)

They constantly have to be aware of risk management:

Because there's the health from the legal side... and they need to concentrate on that. (M)

We do a tools training session from TAFE for the gardeners... to make sure they are safe using that... and they get evaluated through that... that they are doing the right thing... because they are using major articles like chain saws and things... because we can't afford the risk. (M)

It has to be right. I mean the information has to be right, we can't have them giving information out that's wrong. (M)

and are subject to the financial pressures of the programmes they manage:

But can you imagine, funding is very limited, and you organize something and not everybody comes... it would be wonderful if we could afford to do more sessions. (M)

We have to make sure we spend our pennies well. (M)

There's not a lot to go around. (M)
We're kind of better off being associated with government, we think we're poor but when you compare us to some other...but we still can't afford to do. (M) [manager did not complete sentence]

One element which was apparent was that the managers are passionate about the role that they play:

But with most volunteers it's just great to work amongst people who are interested because they really, really want to be here. (M)

and/or the organisation they work for

We really do something quite important. There's people out there who need us, need our services, our volunteers. (M)

The managers are also passionate about their volunteers.

5.5.1 Our volunteers

Managers talked about the importance of their role in relation to the volunteers:

A lot of them need nurturing along the way, I find that is an important part of my role, and it takes time to do that but most people I talk to come on the program because they really want to do it. Yes, so that is basically my role. (M).

I find that you need to take time to speak to people about the program, you need to take time to be personable with them, because they are volunteers, they are giving their time freely, they can work around the place. They are going to help the clients, so I feel it's very important to get to know them a little and talk to them on a personal level. (M)

Many of the managers talked about their relationship with “my” volunteers and referred to the volunteers as “them”. Although in the voluntary association this was not the case, with the President referring to “our volunteers”, us and we, and the person in the partner organisation also making reference to “our volunteers”. In contrast some of the managers referred to volunteers’ requests for advice or help as interruptions:

I get more work done before they come in, when it's quiet, when they're not here, there's not the interruptions to my work, for advice and... (M)

This is despite their supervision being one of the key elements of her role.

In one organisation where the manager of volunteers is also responsible for a number of other tasks the work associated with managing volunteers is confined to two days a week:
We don't have any volunteers on two days each week because we handle the phones ourselves, because it's also nice to have a day free of volunteers. The place is a little quieter. When the volunteers are here I continually get called to help or something, but when there's no-one down there it's quiet. I get a lot of work done. (M)

As a stand alone, this seems a good management strategy, designed to allow the management of the volunteer programme to receive better attention from the manager on the days when they are there. And given that volunteers indicate a preference for a well organised programme, this makes sense. One of the volunteers in this organisation commented that the manager:

*is always lovely to us* (V)

and

*can't do enough for us* (V)

but in stark contradiction to these comments she also said:

*at times it is obvious that she thinks I'm being a pain, but that's too bad 'cos when I don't know, I don't know and that's it.* (V)

Others in this group sympathised with her rather than defend the manager, throwing up an apparent incongruity.

**5.6 OLDER VOLUNTEER VIEWS ON BEING MANAGED**

**5.6.1 Value and respect**

Volunteers consider respect to be an important part of undertaking volunteer activity in their organisations.

*Really volunteering is just like running a business. You have to respect people, you have to give them respect. You know, all those principles* (V)

*In fact you can feel like you are going to work sometimes. You are an unpaid workforce, that's what you are.* (V)

*I won't mention any particular group, but it's not this one, but that unpaid status because you don't get paid you're of no value we'll just use your time.* (V)

*I wonder sometimes how much emphasis there is on the people who are actually selecting the volunteers and whether there is as much thought and interviewing as you would wish going into the interview going into the volunteer selection as there is in expecting the*
volunteers to do a job. Instead of just putting someone on because they can seal envelopes or something and then they are forgotten. I wonder how good the supervisor is supervising their flock so to speak. (V)

These comments reflect a view about volunteering in comparison to paid work, particularly with regard to status. Volunteers consider the person who has responsibility for the management of volunteers to be important, and from the volunteer’s point of view one of the indicators of the level of respect and value placed on the volunteers by the organisation is the manner in which they are managed, and who is appointed to that position:

*the most important person in this chain of volunteers is the co-ordinator, the actual person who deals with the volunteers.* (V)

Volunteers expect to be valued and respected for their contribution. Two elements which intermingled in the conversations were:

- the way in which the manager and other individuals in the organisation valued and respected the volunteers and communicated that to them; and

- the way in which the organisation appeared to value and respect its volunteer programme, including the manager.

Some felt that the respect of the organisation for the programme was reflected in the who and how of the management of volunteers—if the programme is valued and respected a person who both values and respects the volunteers will be appointed to the position.

*Generally speaking, I think it’s the co-ordinator is the key to it. The person who is the manager or whatever ... whether they are old or young or whatever .. it is an important position and I don’t think a lot of organizations appreciate that [my emphasis] (V)*

Sometimes the person who is appointed as manager can actually take on the role to a level which the volunteers consider to be excessively protective of the volunteers:

*One of the classic ones is ... you go in and talk to the co-ordinator and they are dashing around ... trying to get everything done ... you say to them, how about you get a volunteer assistant ... they want to take it all on. There are others who are dedicated to the volunteers ... they don’t want to delegate [some less interesting tasks] to volunteers or anybody else.* (V)

(Note here that the volunteers are aware of the time pressures on the manager).

Conversely the organisation can appoint or retain a person whose approach to the volunteers is seen to be disrespectful:
In another organisation which shall remain nameless...

Because we have got a co-ordinator that doesn't give a damn and doesn't want the job. She is telling the chief that everything's rosy, and not giving any work to the volunteers 'cos she hasn't got the time or the inclination to go about it. (V)

and

She's not interested in what am I doing, why should she bother? It's...it just seems that her time's more valuable doing what she wants to do and this doesn't matter...[aside] not here, of course. (V)

It should be noted, also, that the volunteers wanted to make it clear with asides and comments that they were not talking about the organisations in which the group discussions were taking place.

With respect to the second example above, another volunteer observed:

She may have been forced into that role in the first place (V)

Well,...that's how it seems (V)

Nobody else wants to take it on...oh well I'll do it... (V)

...yes...and she's been delegated... (V)

Evidence that such an appointment is not isolated:

...I've seen that so many times... (V)

from another volunteer in the group discussion.

Volunteers seek to be valued and respected by the organisations in which they are involved, and for older people this includes being respected for experience and knowledge which may be of benefit to the organisation as a whole.

Examples of people not treating volunteers with respect were not limited to any particular type of work or role:

The place where I was doing the housework, there were people living in they had teenagers who would treat you like the staff, treat you like the hired help, you know. And they expected you to clean up after them. It was not made plain to them that the person who was clearing up after them in the dining room was doing, and I've heard this also from friends who work at the hospital, in the kiosk, that people take their, buy their drinks and things at the counter, take them away and leave them on the tables for the volunteers to clear them up, and things like that. It should be made clear to people that you are not there to pick up after people who are quite capable of doing it themselves. (V)
Clearly here, again, however the volunteers voiced their expectation that the organisation should communicate their volunteer status to the public or the clients.

Once again the comparison is made to paid work.

Some volunteers take it upon themselves to make their volunteer status clear:

*I often say to them well I am a volunteer here. I come here one day a week etc and they kind of relate to you a little more. (V)*

*One of the first things I told 'em was - 'I am a volunteer myself' and then you go on to the spiel, you know. It's important, I think, you're not taken for granted then. (V)*

Respect from the general community also came up:

*I say, 'Well why don't you do some volunteer work?' 'Oh bloody volunteers, do-gooders', you know. You get that sort of response, you know, and then out in the community, there is still, it's not as bad as it used to be but there is still that sort of response in some. (V)*

*But the people that are in the paid force, they look down on you and think, she could be getting paid for doing that... (V)*

Once again the spectre of paid work is lurking. The paid/unpaid divide is one which was not immediately apparent but which when the data was reviewed was found to permeate much of the data. This comparison is further discussed in the next chapter.

5.6.2 Volunteers are skilled and experienced

A significant contribution

As a further contributor to the understanding of "what is meant by older volunteers?", the characteristics "older volunteers" are said to bring to the organisation was prominent. Volunteers who participated in this study carried out a range of roles from volunteer co-ordination and management:

*I'm actually in an administrative role... but I am a volunteer (V + M)*

to reception and clerical work:

*Well, I come in precisely to oil the wheels, if you like. I get files out... Then the secondary thing is answering the phones and directing queries to whoever it may concern and making bookings over the phone, and sending out letters of confirmation to people and then in between that there are other chores or little jobs. (V)*
I have people working with me on clerical support, telephone support, going out and visiting those organizations, photo journalism, talking to people. (V)

teaching others:

Teaching basic computer skills to seniors and which would be internet, email, word processing, just the basic skills, turning the computer on and off. (V)

recruiting volunteers and public speaking on behalf of their organisation:

There are displays at shopping centres. (V)

I am a Liaison Officer. (V)

I do talks in the [name of recruitment and induction programme with public speaking] talks to new volunteers or potential volunteers to make them aware of the problems or the pleasures of being a volunteer. (V)

They're mainly retired people that were out there in the workforce or business people that were used to public speaking, they came in, were given training to impart the knowledge of this program, what it's about, to go out and spread that word. (M)

weeding, cleaning gutters, pruning trees:

We've got the gardening service, maintenance service and social support service and office volunteers as well. (M)

showing visitors around at their place of work:

W guide visitors, lead walks, tell them a bit of the history. (V+M)

mentoring young people:

I am just sort of poking around giving them a hand... keep them under control making sure they don't show their hand under the saw. (V)

We have the benefit of being together with them... and bringing them together... yes... they teach us... they teach us... and we teach them minerals which is the brain thing. (V)

providing social support:

We even go in the prison, and you know, there's people out there that need your contact. (V)

and participating on committees of management, and consultative committees:

I'm on [name of committee] in the suburb... and that's a job, I should say a volunteer's job whereby you just wander around the district suggesting improvements in the way of street verges being fixed up.
trees to be planted here, footpaths to be repaired, different jobs that should be done (V)

Other types of work which volunteers reported as being involved in at organisations other than the ones involved in this study include driving for meals on wheels, befriending, and conservation and emergency services. The variety of work undertaken, and the skills required to do this work showed that volunteers are skilled and experienced, and they interact with a wide variety of people in their roles similar to paid workers.

As the volunteers talked about what they do when they volunteer there were a couple of patterns which were apparent to me as researcher. One of these was that quite a lot of the volunteers undertake volunteer work in more than one organisation:

I have another volunteer job as well which I didn't mention. (V)

They may allocate their time to different activities on different days or in different patterns with paid work, other commitments such as caring for grandchildren or part time paid work:

So I have got five days a week I am doing something and the housework gets done at night time, weekends. (V)

I am doing it two days a week, if possible, sometimes more, and I still do a bit of part time work in between that. And as well I'm involved in Meals on Wheels...and I do that two days a week...Mondays and Wednesdays...and I work St Vincent de Paul as well on the Friday. (V)

Another recognisable group, in contrast, volunteer quite a lot of hours in the same organisation over the course of the week:

And I come in here two, sometimes three days a week. (V)

Some of us would be involved up to twenty or so hours some weeks, what with meetings, and [volunteer activity] and paperwork and phone calls. (V)

The same organisation will have both levels of activity:

Most of us would do round about 5 to 6 hours a month. If we are just doing [activity 1] and [activity 2] the minimum would be three and a quarter hours plus one and a half but then there's the meetings, and then meetings if you want to catch up and the expectation is under ten a month but there are some of us who do more than that...maybe not actually here but on the phone and in meetings and doing the paperwork and rosters and some of us particularly in this room would do twenty, thirty hours a month. (V)
The hours devoted to volunteering by the volunteers in this study are extensive, consistent with the evidence in the literature that many older volunteers are what is known as highly committed volunteers (Lyons & Hocking, 2000). All the group discussions contained representatives of both of these types of volunteer. Those who volunteer in more than one organisation undertake wide ranging activities, with the same volunteer being involved, for example, as a computing tutor in one organisation with a paid manager, and at the same time as a tour/walking guide and management committee member in an all-volunteer organisation:

*My other volunteer work is coordinating and managing a series of tours and looking after a group of volunteers. (V)*

Variety in volunteer activities was not confined to the volunteers who undertake volunteer work in more than one organisation at a time. When talking about their volunteering history almost all the volunteers had undertaken a wide range of tasks over the years. Only a small number of the volunteers had only experienced volunteering the current organisation. The wide and lengthy experience of the volunteers contributes to the understanding of them as knowledgeable and experienced with the phenomenon under investigation.

**Contributing life experience**

Managers identified the qualities of older volunteers:

*They're experienced and knowledgeable and have life experiences and you know (M)*

*They'll talk about their life experiences. They'll end up doing extra time to talk about the war or to talk about something that they have done. They don't mind putting themselves out at all to do that sort of thing. (M)*

*They'll talk about things, you know in the past, they just, I think they have a different kind of...humility perhaps. I think when you have reached, when you have been through a lot and you've lived through it, there seems to be a kind of sense of humility that comes from it maybe a laughing at adversity perhaps. (M)*

*They also have a sense of humour. They have much more sense of humour I find. They are so funny some of these old people, the older they get and the harder it is for them, they sort of just have a light sense of humour about them. But they are quite serious about what they are doing. (M)*
I found that a lot when working with elderly people that they tend to be very forthright and say what they are thinking and what they want. There isn't that trying to work out what somebody's after. They are quite up front about what they want, what they need, what will help them. (M)

They bring the most amazing things into the organization. I am just forever getting surprised and rewarded in some way or another because they, being older, the clients just love them. The clients just love the older people. There's no doubt about that. There's a different relationship, we think, with the oldies, with the clients, the clients just need older people. (M)

One manager described made a comparison to younger volunteers:

*The older generation seems to be just more committed. They just don’t seem to have that same kind of reservation that is there in perhaps someone who is younger, maybe that self-consciousness.* (M)

Another manager compares concern about performance:

*They seem to be a little more concerned [than younger volunteers] as to whether they will do a good job.* (M)

Volunteers were more likely to make comparisons between older and younger volunteers than were managers. There was, however, little consensus between volunteers on the issue of generational differences and, in fact, in some cases the position of the group moved from some level of agreement about there being distinct generational differences, in particular when referring to "the younger generations" to agreement that this might not be accurate. The discussion about younger volunteers, however, seemed to be more about volunteers clarifying special qualities they thought older volunteers brought to the organisation by setting them against younger people:

*Older people are more able to accept a situation while younger people may be more picky and choosy? [tone indicates tentative suggestion to the group](V)*

to which there was a response

*No! I think the other way, I think older volunteers are more likely to be critical of the management.* (V)

This provoked some debate including

*Of course there are a lot of younger people that are quite responsible and that sort of thing but older people because they've got the experience and because they feel more comfortable in the volunteering and probably they're not looking for a job in a lot of cases they're much...and they last longer.* (V)
and a response

I think that's a good point, talking about not getting a job. I spoke to a co-ordinator this morning and she said we are getting a lot of younger people now and they don't last long. They get a job. They [co-ordinators] prefer older people. They usually stay longer. (V)

In other discussions there were disagreements about whether older people were better suited to particular jobs or not:

I don't agree really that older people necessarily have relative experience in dealing with the young. It's such a different world. (V)

was responded to with

They [the young] have very different attitudes which really serve today's world better than a lot of our attitudes. (V)

but also with

It all depends on the older person whether they are up with the [young]... (V)

and

And also you know you've got to be positive in your outlook and not be too judgemental about things. I think that if you are an aware person and you read the newspapers, you can... (V)

Some volunteers felt that the individual was more important than their age group:

I think really it's a matter of the individual but as a giving person you understand the other person's needs and be that...it's about flexibility and understanding. (V)

However, this was contradicted by the same speaker later in the conversation:

The younger generation don't have as much giving in their nature. They are more. I find a lot of them are takers more than givers, where I find the elderly people, just like you say, that they can sense, that these people are on their own, they are alone, they have that flexibility to give that little bit more. (V)

and others agreed:

The younger people I find they don't, they don't give that extra mile. They just do the job and get out of there. [sounds of agreement, mmm yes] (V)

The comparison of older and younger volunteers will be discussed in the next chapter with regard to the social construction of age. It is also important to note that there were some significant contradictions in the manager's characterisation of "older
volunteers" which emerged once the interview turned to discussion of "decline" or their own management responsibilities.

_Managing is very important and a lot of the volunteers can be very jittery or a little bit nervous... or their self esteem isn't that great... but it is something that they would dearly like to do so they... (M)_

These contradictions are also examined in the discussion chapter.

**Contributing workplace experience**

A recurring theme was the respect for the experience, in particular, workplace experience that volunteers bring to their volunteer work. Quite a few of the volunteers talked at some point in the interview about their work life, with many of those who talked about their work experience indicating that they had retired from professional positions. This was not a universal situation. In the organisation where physical labour, companionship or clerical work are the primary tasks undertaken by volunteers only one volunteer offered this information:

_I worked in an office, and we always had to make sure we were on top of the filing. (V)_

However, across the other organisations volunteers who mentioned their paid working life had usually held positions which they felt allowed them to make an evaluation or comparison of the management they were experiencing in their current volunteer work. Usually the indication of previously held positions came in another context:

_having had an administrative role in the public service... in my employment (V)_

_Once I left work I tended to be involved with the administrative side of volunteer organisations and on committees and taking a leader role because of my career situation which had been in senior administrative human resource management. (V)_

A specific example of this is a former journalist who referred to the time it takes for volunteers to put a book together due to the delays in getting support or answers:

_"I've only ever worked in newspaper offices where, of course, time is very strictly controlled. (V)_

and another when referring to what he can contribute:

_I'm an engineer by profession. (V)_

A volunteer summed up the feeling held by many:
A lot of the people here have had very good professional lives. They do know about organization and management and communication and if you get into a place where you feel that the person directing you doesn’t really know any of those things I suppose you are perceived as being a bit awkward. (V)

Skills and experience with technology

Technology and computing was an area where there was debate about whether differences exist between older and younger volunteers. Some volunteers were quite proud of their lack of knowledge of computers, for example, but others were so engrossed in computing they wondered what they would do without it.

One volunteer said she was happy not to have mastered a mobile phone:

*I’m blissfully ignorant... and I am really glad for it.*

Another reported being bombarded with email spam and feeling a sense of achievement for having worked out how to install filtering software. There was agreement that to portray older people as not wanting to know about technology was wrong:

*... and I think a lot of older people embrace some of this ... they’re quite keen to know and get involved in computers and things.* (V)

One group had considerable discussion on this topic of computers and technology, some of which is included here:

*When I was a manager in a business I very rarely used a computer, because I didn’t have to.* (V)

*You had someone else to do it... yes?* (V)

*I had accountant. I only did this and that but when I left I went and did a course at TAFE. You know in no time at all I least I could switch it on [laughter]. You know, I even learned to type, but it didn’t take very long, and it doesn’t, you know? I mean a lot of people, they, you know, they say ’I couldn’t do that’ but they don’t even try, but that’s beside the point because I think older people when it comes to... the thing is you... common sense will overcome anything.* (V)

Note here the additional skills the volunteer needed for the volunteer work that they had not previously needed, and the matter of fact effort to get these. Certainly on the subject of technology there were mixed feelings amongst the volunteers and the lack of a consistent view. Other group discussions had similar conversations.
5.7 THE PAID/VOLUNTEER STAFF RELATIONSHIP

5.7.1 Division of labour

A key element of the issue of respect arose with regard to the relationship between the paid and volunteer staff. There was a contrast between the views of the volunteers and those of the managers. In the main the volunteers indicated a distance from the paid staff:

"The office is broken up into two parts. Much of the executive and the workers are apart from the volunteers. We don't see a great deal of them. We don't come into contact with them to any degree. The only ones we come in contact with are the one's associated with the [identifier deleted] system, and therefore it's, I mean, those who work on the [identifier deleted] here, I wouldn't know who they are. So we are remote from them and perhaps it isolates us to a degree, and perhaps makes us a little sometimes indifferent to the staff and probably them to us. (V)"

In one organisation, however, the delineation was not apparent to the volunteers in any negative way, and this was recognised as being one of the positives about this particular organisation:

"No, we are not treated as a separate entity. We are treated as equal to the staff and it's a rare, it's a rare thing. (V)"

Note the comment of the volunteer that this is rare, an indication of the volunteer's contrary experience elsewhere.

In a contrast between organisations there were paid co-ordinators supervising/running teams or groups in one organisation, where in another the team leaders/co-ordinators were volunteers. There was still evidence of a distinction between paid and volunteer workers with the paid team leaders being empowered to take responsibility for decisions:

"When you are working in the [venue], [good communication skills], it's not quite as essential because most of the communication will be done by the co-ordinator, each [venue] group would be run by a paid co-ordinator. (V)"

Here the volunteer team leader indicates that decisions would be referred up the line:

"It wouldn't be up to me, I would just pass the information on and let [name deleted] make a decision about following up. (M+V)"
This concept of passing responsibility up the line was one that was not confined to the volunteer team leader where the issue was complex. This will be returned to later in relation to management responses to changes in volunteer capability.

5.7.2 Boundaries

Managers also commented on volunteer-paid staff relationships. The volunteer-paid staff delineation was mentioned by the managers in all the organisations, where there were lines and boundaries which volunteers were not expected to cross. This was mainly presented as being a protection of the volunteer, but was also at times a requirement for insurance or because certain tasks were clearly the responsibility of paid staff. In one example the manager indicated that she felt there was no boundary, but listening to her, there was still a clear line drawn between the work of the paid staff and that of the volunteers:

"I think in this organization, and I've worked with volunteers in other organizations too, they are very much treated as staff in lots of ways, which is really nice because there isn't that sort of boundary I suppose...that delineation I suppose...between the two of them. There's nothing like that here, which is a nice culture to be in, it's a very unusual culture, because usually there's with this or with that 'He's a volunteer, basically he can't do this or'. There is that sense of a cultural thing that goes on there, but here there isn't that. Obviously there are things that volunteers won't do, and aren't asked to do, but there's always boundaries. When you work with volunteers there is always that aspect to worry about. (M)

One manager saw the volunteers being autonomous in their "bit":

"They pretty much do everything in that area, namely answering phones, interviewing potential volunteers, doing checks on people and with organisations, and it's only if they can't work it out amongst themselves that they come and see me. (M)

There is evidence here that the volunteer area is separate to the work of the manager and is still an example of the volunteer-paid staff separation. As discussed in the literature review, the ‘Principles of Volunteering’ (Volunteering Australia, 1998; 2005) make it clear that volunteers cannot take the work of a paid staff member, and a consciousness of this may be partly contributing to this divide, but there is also a sense of how much responsibility can be placed on a volunteer by the manager and the organisation. Such a question fits in with the setting of expectations and standards.
5.8 PERFORMANCE STANDARDS AND EXPECTATIONS

Research question 2 set out to explore the experience of managers and volunteers when the manager thinks that performance is declining due to age.

**Question 2:** What are the experiences of managers and older volunteers when a manager perceives that an older volunteer's performance is declining due to age?

In order for performance to be viewed as declining there needs to be some understanding as to what level of performance is expected.

5.8.1 But who’s to say what a good job is?

The issue of performance standards emerged as a counter to a largely unspoken question as to whether the performance of volunteers can and should be managed. In all the group discussions the subject came from the group in different ways. One volunteer rejected performance standards:

*Well I just want to come in and do my thing and leave, I don’t want to be worried with all this extra stuff.* (V)

but another responded:

*Yes but if it is well managed that is exactly what you can do, isn’t it.* (V)

In another group one volunteer voiced thoughts about the possibility that standards need not be high for volunteers:

*We are only volunteers after all.* (V)

However, this was met with protests which included

*Yes, but you try being a volunteer where no-one knows who’s doing what, and you turn up when you are supposed to, having left dishes in the sink and find that they’re so disorganised it’s a waste of time, I’ve done that I can tell you [tone of some anger].* (V)

In another setting

*Our performance, to my mind, must measure up to the executive of this show, to the point that they don’t interfere with us to any marked degree at all. We seem to have, you know, a free wheeling way of doing things, so what we are doing must be OK by their standards, because if they weren’t, if our standards weren’t, I think we would be told.* (V)

It is interesting to note that involvement by the executive here is referred to as “interference” rather than top management support.
A comment specifically on the subject of standards for volunteer performance

We really do have to do a good job though, don't you agree? (V)

to which another volunteer responded

But who's to say what a good job is? (V)

which was followed by a third person saying

Well we need to know what they expect of us, and then we'll know, won't we? (V)

identifying that some, at least, see a need to know what is expected of them.

In this last conversation the group then got on to talking about the performance of a particular person:

She thinks she's damn good at it, but do you agree? No! and neither do I, but who is going to tell her, and shouldn't someone? I mean it's not good for us, it's not good for [name of organisation deleted] and if the truth be told it's probably not good for her either. (V)

Well it's not good for her to go on not knowing and I guess [name of manager deleted] should be the one to tell her. (V)

It is interesting to note here the interplay between performance and what is good for the organisation, and also whose responsibility it is to manage what the volunteers consider to be poor performance.

In the Voluntary Association – Organisation 5, the reputation of the larger organisation was seen as being at stake if volunteers were unable to meet the standards seen as appropriate in their work and it was well recognised that the public would not make a distinction between the larger organisation and the voluntary association, nor between paid staff member and unpaid volunteer:

In the end we provide a service and they couldn't do it without us, it would simply cost too much, but if something goes wrong it goes back on the [name of organisation deleted] and no-one is going to worry if you're a volunteer or not. (V)

Volunteers expressed a view that performance standards matter:

I mean, really, if a job's worth doing, it's worth doing well, isn't that what they say. (V)

You kind of have to know if your people are doing a good job, well, I mean, the clients will complain anyway, won't they, and of course they're entitled to, you know. (V)

It's the reputation of the organisation, isn't it. (V)
Note the link again to outcomes for the organisation. These were even considered by volunteers to be important in terms of risk management:

*The amount of paperwork this “risk” thingy generates, it’s beyond a joke. But we’ve all got to face it, we’re getting more and more red tape all the time, but some of it is to protect us.* (V)

*Yes and some of it is to protect [name of organisation deleted].* (V)

The managers, too, seemed to take for granted that there was an expectation that certain standards would be met:

*We need to brief the volunteers about what procedures [organization] has in place...The duty of care is with [the organization] but the volunteers need to know.* (M)

but were also fully aware of the voluntary status of the individuals concerned. There was also some level of ambiguity about the what, how, who and to what extent performance of volunteers could and should be measured or evaluated. This ambiguity is quite clear in the words of one of the managers:

*They are only volunteers, after all, well, that is to say, not ONLY [emphasis in speaker’s voice] volunteers, because we certainly couldn’t do it without them but I, it’s, um, they can’t be expected to, well, we really do expect them to do a good job, but if they don’t then well, what can we do, it’s kind of like, ask them to leave, so what, and who will do it then? but we do that, you know, ask them to leave, if they just can’t do it, but not often, not often, and how do you tell anyway, you can’t really measure it can you, or can you?* (M)

Managers operate recruitment and selection practices which place a focus on the standards and expectations placed on the volunteer. Sometimes difficulties arise in the recruitment process or during the training or induction period, and occasionally in the form of probationary or trial period. Usually in these situations managers do not find much difficulty in asking a volunteer to seek volunteer opportunities elsewhere, or in helping divert them to something which might be more suited to their abilities or temperament:

*If we get a feeling that they are unsuitable, we will try to definitely make an orientation day for them, so that we can meet with them and basically suss them out a little bit further. It is very much a gut feeling, at some times, you know, that that person is simply not suitable. They could be opinionated, or extremely religious, or a warning sign that comes out to us, and we feel they would not be suitable at the [venue]. We basically just don’t place them at the [venue], at any [venue], and*
politely suggest that their skills might be better utilized in a different form of volunteering. (M)

Sometimes such a task may not be as simple as just telling the person they have not been selected:

One gentleman who has a brain injury, a tumour or something removed, I think and he is just a very angry person, and he reacted he didn't react well at all, to being spoken to. We invited him to come in for a meeting; [name deleted] had a meeting with him. If there is anything like that to be done it is always done face to face, with the person, with other people present. (M)

In the main, however, this research was looking at the management of performance of volunteers, and while the recruitment and selection process is germane by virtue of its importance to making sure volunteers can do the job for which they have been recruited, not a great deal of time was spent on this aspect of the activities of managers. It is important to note that in all the organisations participating in this study some form of recruitment and selection/placement process takes place, and training is available to volunteers to equip them to undertake their work. In three of the organisations, one of the conditions of appointment/placement is participation in the training. In one setting this is due to the importance of screening applicants who will work with vulnerable clients, in another due to the importance of quality products for member clients, and in the voluntary association as part of the development of an overall quality/performance management process which is discussed later.

5.8.2 “Waning powers”

All the participants in this research were keen to point out that the concerns were about changing capacity due to age, and the issue under investigation was not due to the fact that older volunteers performed their volunteer work in a poor manner. As has been revealed, older volunteers are seen as bringing wisdom, experience, patience, time and passion to their work. However, all of the participants were aware of some of the changes which can occur in individuals which can change their ability to undertake their volunteer work. One volunteer commented, however, that

older volunteers sometimes they go past their use-by date. (V)
"They get old and dodderly" and "they can't hear the clients any more"

The data revealed that physical and sensory changes were apparent to managers, volunteers and peers:

But you don't really notice until they can't do something, or you notice a change in their appearance or they get the shakes or something, or suddenly you find they are not quite as quick as they used to be... it can kind of creep up on you, you know. (M)

It's normally why most volunteers leave - with the older ones because of health reasons. (M)

Managers talked of the changes they had witnessed:

They do get old and dodderly, they can't get up the stairs. (M)

They can't hear the clients any more. (M)

A lot of volunteers have had to leave because they have lost their eyesight and they just can't see any more, and believe me they still want to do it. (M)

She came in one day on a frame, she was very frail and the kitchen is not particularly equipped to have someone with a frame walking around, and we were worried about hazards, and people falling over her, and all of that kind of thing, you know, bending up and down and with her lifting heavy things where she couldn't. (M)

Some volunteers are able to recognise these types of change themselves:

I try to sit near the front these days you know, so I can hear. (V)

Well, you kind of have to hold the papers out here, like, or search around for your glasses, like when the print is too small. (V)

Some witness changes in others:

He's a bit slower now, he was so active. (V)

She shakes a bit, and kind of takes her time getting in the car. (V)

Volunteers report restricting their own activities by not putting their name down for long walks, reducing the amount of time they give to an organisation so that they don't get too tired, or letting their team leader know that they should no longer be the person who climbs on the roof to clear out gutters when a work team goes to help a client with maintenance in the home:

People state what sort of condition they are in anyway. If they expect you to pick up slabs you say well, I'd rather not do that, you know,
might have a tendency of ending up being really, you know, hurt later on in the day, so you do something else – well I do, anyway. (V)

Since I had my operation, you know, I just let them know and they let me do what suits me. (V)

Managers talk of managing some of the changes which they need to be aware of such as preparing rosters in big enough print for the volunteers to be able to read:

And me too these days as it happens. (M)

They are conscious of a need to be aware of physical changes when assigning tasks:

Some of them are not as strong as they used to be. I just have to make sure that I don’t push them over their limit. (M)

Some anticipate problems:

I get worried about them going on the roof and stuff, you know. (M)

Managers and volunteers appeared to have a shared understanding of the types of physical changes that can have an impact on volunteer activity.

“You know they have got so much insight...and then...they have lost their way”

Changes other than physical changes which are not so apparent are far more complex. Some changes may mean that the volunteer is unable to remember the instructions about how the filing systems have changed:

She couldn’t get it, and kept putting things where they used to go. (V)

The volunteer may be unable to remember that he is no longer licensed to drive the bus (this example from the Masters study referred to earlier), and may turn up to volunteer at times and on days for which he is not rostered:

come and sort of sit and, just come into the [venue], basically to be [at the venue], but it is not their volunteering time. (M)

They may take so long to process the topic under discussion in a debate in a meeting that their input is delayed, convoluted and difficult to follow, causing frustration for everyone else:

And somebody will say something quite clear to everybody else around the table, and she will in some way take it, not the wrong way, the mixed way, and then you take five minutes to get back to where you were. (V)

In another discussion in another setting
I'm not sure it's just that she didn't hear it, I think she's not really getting it any more. I mean do you remember the other day when we were trying to decide that you know that issue we were discussing, and she just completely lost the plot, like she was still stuck on the idea. (V)

Volunteers talked of fellow volunteers or situations they had witnessed, with some sadness:

You could see she was going downhill, you know, we all saw it, she just wasn’t there in the same way any more, but she kept on coming. (V)

You know they have got so much insight, and then... they have lost their way. (V)

As a subjective researcher I noticed that at first it appeared that none of the volunteers who were participating in the discussions could be considered to be experiencing some of these more subtle changes, which might be identified as changes in cognitive ability. Some, however, reported lapses in memory:

Oh, I never used to forget, but these days there are times when I am buggered if I remember what I was supposed to do. (V)

Some had noticed a slowing down in their own abilities:

because I'm slowing down now I am older. (V)

These volunteers both associated the changes with age – note the reference to “these days” and “now I am older”. It is important to note that there is evidence of volunteer sensemaking where the volunteers wonder about their own actions:

Sometimes I do stuff and then I realise that perhaps I wasn’t supposed to do that, and I think to myself, hmn, wonder why I did that? (V)

and

You can look back and see that you are slowing down a little. (V)

One volunteer felt that this created a cycle which was self reinforcing in that the stress created by self knowledge added to the pressure:

Can I say a word touching on what you were saying? I sometimes feel a bit of a fool, because I'm older now and I am slower. I know I am slower and I find I don’t handle stress as well. If I’m doing something on the computer and somebody is waiting for it or if there is a time limit, I feel awful about this, the more stressed I get and the more blank I go in the head as far as my computer is concerned so that there are differences being older than there would be if you were in the workforce... but does this matter? (V)

(Here too, there is a reference to ageing, and also to the paid workforce).
In one of the group discussions, however, the topic became one of exploration and questions when one of the volunteers began talking about her late husband who had been almost entirely dependent on her in his later life and who had suffered from what she referred to as Alzheimer's. Her descriptions of his inability to care for himself, and his difficult moods and behaviours lead to quite a frank discussion of the reality of dementia. In another group one of the volunteers had experienced the early stages of some form of dementia in a colleague in a paid position and there was discussion of her experiences of this colleague's difficult behaviour which lead to some limited discussion of dementia. This colleague had not been what any of the volunteers considered “older” but the essence of the difficulties for colleagues was one which the group explored a little. This is further discussed under methodological gains.

Managers reported that some volunteers are aware of their changing capabilities:

*I have come across it and it’s normally, they will speak to me and say, ‘I’m just not up to it any more. My brain is not working and I can’t remember’ or, you know, they are very open about talking about their health. It does happen, but they seem to make their own mind up that they are going to drop the program because it is too much for them, and they are just not emotionally dealing with it. (M)*

but at times it is a more subtle change which is witnessed by others and not really noticed by the individual. Managers and volunteers reported that sometimes it is behavioural changes which they have noticed rather than a change in ability.

“*Volunteers haven’t been pulling...haven’t been going the same way as the other volunteers*”

At times volunteers’ changing behaviour causes problems for the manager. Not obviously changing physically, and in most of their work performance still sound, managers report changes in terms of the impact it has on them, the managers, and their work, or on the clients or organisation:

*They get opinionated, at times, and that causes problems with the [venue], because it’s not, the [clients] don’t warm to that sort of thing. (M)*

*Being a nuisance in so far as they sort of take over a bit. We had one gentleman who was causing some problems because he would just...*
walk into the office and do all of his photocopying and get everything organized and more or less start running his own show. (M)

Volunteers haven't been pulling, haven't been going the same way as the other volunteers, and that has become a problem. (M)

they get a little bit grumpy maybe. (M)

So we had a couple of gentlemen, old gentlemen, they were fairly elderly too, but I, my impression was that they were lonely and they really didn't have anywhere to go and, or anything to do, so they would go to the [venue]. But they were not to be there when, when they are not on duty so to speak. Because the client doesn't really know what to do with them and someone has to look after them, at the [venue] or they have to tell them to go home. (M).

Managers cited a range of behaviours which they saw as changes in behaviour from older volunteers:

- breaching confidentiality, either accidentally or deliberately

  *It is really inappropriate to talk to clients about other clients but we kind of had to ask him not to, on more than one occasion...*(M)

- refusal to accept (often accompanied by denigration of) other people's ideas and suggestions

  *If it's not the way she wants it it's a silly idea, you know, she used to be, to be* (M)

- refusal to cooperate with (and sometimes anger) at change processes, including bringing in new helpers with different ideas

  *If you want to make changes, we're going to be making changes, but if you want to make changes you have to make sure you, especially with the older ones, the ones who've been around for a while, you have to make sure you are prepared for them to be upset or not go along with it.* (M)

- disruption to the work of others, perhaps simply by being there at unusual times or by talking to others who are trying to complete tasks

  *We have a couple, a couple of them, who talk, and talk, and the others sort of feel sorry for them, because they're not really doing anything, but they can't make phone calls and listen to these two.* (M)

- gossiping and undermining efforts in directions they do not agree with

  *There are some, who've been around for a while, who tell everyone who will listen that the new rosters won't work.* (M)

- confrontational behaviour when they feel that their views have not been adequately considered
We had this guy, in my other place, you know where that is, he used to bale up the manager and ask her if she'd read his email, if she knew he'd offered to talk to her because he thought she was making a mistake. (V)

- badmouthing of the organisation to outside clients, or people who provide facilities and services which can be damaging to the organisation's reputation

They asked him to do it differently, to do some other stuff, and he went and talked to, to, let's just say someone important, you know in the Department, where some of the money comes from, someone he was friends with, and the next thing we know we're being looked at, well [name deleted], in fact they said she wasn't doing it, we weren't doing it wrong, but his words caused trouble, and he made waves, where it counts. (V)

- intransigence in the face of change – claiming it is their “right” to continue to do things the old way. [This was described in memo created after discussion with the manager on the phone to set up an interview].

There were also a number of behaviours described by managers and others who participated in a discussion at a conference where preliminary findings were discussed with participants. Many of these were repeats or variations on the behaviours mentioned above but a couple were new. These new behaviours are offered here:

- officious behaviour which leads to the departure of others – telling people what to do, interfering in decisions. [This described in memo created after conference March 2005]

- undertaking roles and tasks outside or beyond the scope of their volunteer activities – sometimes without the knowledge of the organisation. [This described in memo after conference March 2005].

At times it is a combination of these things which can lead to stress for the manager, and for peers. All of the managers and volunteers took a great deal of trouble to point out that such events were not an everyday occurrence:

It doesn't happen often. (M)

I've only seen it once or twice. (V+M)

They affected a minority amongst the volunteers:

Only the one. (M)

You get a couple once in a while. (M)
Managers also indicated that they found these events stressful and time consuming despite the low occurrence. The subject of responses is returned to later in this chapter.

It was interesting to note that whenever the volunteer groups were talking about such behaviours there was often a comment from the speaker who reported the issue along the lines of

not in this organisation, of course. (V)

or

this happened in my other volunteer place. (V)

On a couple of occasions, however, without names being mentioned, it was apparent to me as researcher that most participants in the room were aware of who the speaker was talking about and on the tapes you can hear noises of “mmm” and “oh”.

It should be noted at this point that all of the behaviours described above are familiar to managers of workers paid and unpaid, and of all ages. Two elements warrant their inclusion here: the participants cited them as examples of behavioural changes, and they associated those changes with ageing.

5.8.3 Sealed section

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5.8.4 Naming the undiscussable

Often the subject of “decline” or “waning powers” is one which people are reluctant to discuss. This may be, in part, due to societal taboos or to personal denial (Kerwin, 1993). By including a scaled section (above) this path has been followed here by me. I chose this course so as not to interfere with situations which have arisen for individuals where I have not really got any avenue for knowing about or providing assistance if the individuals concerned think they are able to identify themselves. If
this were to happen I would be unable to follow through and help to minimise the
damage which might arise. (This is further discussed in Appendix E). That aside it
was an interesting situation to consider – where the findings of my research were
advocating more open communication and discussion about perceptions of declining
performance associated with ageing – and then to perpetuate the practice of not
discussing it. The “undiscussable” nature of the topic was an important element of the
data gathered in this study.

The managers and volunteers who offered insights into how the situation
might arise where a volunteer is continuing to undertake their role even when they are
no longer able, or where their capability has changed, offered a range of explanations
and theories.

I was kind of waiting for someone to say something

In some cases these were based on personal experiences, with volunteers
indicating that they were not sure that the changes in their own capabilities were
noticeable:

I was kind of waiting for someone to say something because I wasn’t
sure if it was just in my imagination. (V)

I knew I was getting slower but. (V)

There was also evidence that sometimes volunteers hung on in their roles until they
felt that there was someone to take over:

At the moment I’m the assistant secretary for one of the precincts in
the Perth area. I’ve been in that position for about six years, acting as
Secretary, but I’ve just become assistant secretary which I’m very
relieved about because it has all become a bit much. (V)

Succession was a concern raised both in the surveys reported earlier, and in
group discussions and is discussed again later.

There were some volunteers who felt that moves to take over would not be
welcomed by the volunteer whose behaviour is the subject of concern or that the idea
of taking over is somewhat intimidating:

We’ve got one who is 86 who manages a large section for us.... In the
few years I’ve belonged you can see that her autocratic manner is sort
of gradually aggravating everybody else who has to deal with her, and
she has been in it for so long that she sort of dominates. I don’t know
that anybody will ever have the courage to say I think it is time you
handed that job on, because she, I mean you sort of look at it and think
'I don't want to do it. Who else will do it? There is so much work.' that you kind of keep them going. But short of her actually dropping dead I don't see that anybody is going to be able to take it away from her...or want to. (V)

to which another responded:

How do you approach...it's her life...it really does form so much of her life. (V)

Once again the concern is expressed about taking away volunteering as an activity which is important to the volunteer. Others concurred that sometimes the longer serving volunteer won't let go, rather than there being no-one to take on responsibility:

They'll take it and they will run it but because they do, they want to run it their way. They won't want somebody else taking it over or give over gracefully, but they wouldn't be doing it in the first place if they weren't that type of person. (V)

Yes, and other people will let them because they don't want to do it, nobody else wants it. They say no you want to be boss you go ahead. (V)

One volunteer was ready, willing and able to take on a role which was being undertaken by an elderly volunteer:

Yes, in fact I had a case. My first offer to volunteer when I finished full time work. They wanted somebody to run their mobile library. I thought this sounds interesting. I got on the phone and they said, yes come along and perhaps we can organize something. [place name] or one of those libraries. Anyway I got there, 'here I am'. They said, 'I'm very sorry we can't take you on because the man who is doing the job' who was about 90 in the shade, 'really feels he can still carry on and do it, even though he can't'. [laughter] They just didn't want to push him out.

He didn't want somebody taking his job over, but they really needed somebody, because he was fouling up, that's what it boiled down to. (V)

Note the dilemma about the balance between the welfare and wellbeing of the volunteer, and the performance requirements of the organisation. Note also that humour and laughter are part of this discussion.

There are volunteers whose capabilities are perceived by others to have changed who continue to undertake their volunteer work, even when those changed capabilities are perceived to have an impact on outcomes. There is a shared
understanding between managers and volunteers about such changes, although this is less clear cut when the types of changes being referred to are more subtle changes (sometimes cognitive and behavioural), rather than more apparent physical changes.

The next section of this chapter examines the responses of managers and volunteers when they perceive that some sort of change is taking place which influences the ability of the volunteer to carry out their work.

5.9 CHANGED CAPABILITY: REACTIONS AND RESPONSES

5.9.1 Self management by volunteers

I'm just not up to it any more —

Managers recognise that volunteers take action for themselves, at times reluctantly:

*A lot of volunteers have had to leave because they have lost their eyesight and they just can't see any more and believe me they still want to do it. (M)*

*I have come across it and it's normally, they will speak to me and say 'I'm just not up to it any more, my brain is not working and I can't remember' or, you know, they are very open about talking about their health. It does happen, but they seem to make their own mind up, that they are going to drop the program because it is too much for them, and they are just not emotionally dealing with it. (M).*

When volunteers withdraw or limit their activities themselves it removes the responsibility for action from the manager. There are times, however, when the manager is in the position of having responsibility for a volunteer whose performance is seen to be changing. The managers tended to report that this was not a common occurrence, consistent with the data from the survey, but that when it does occur it is time consuming. There is also evidence that it can create a lot of anxiety for the manager.
5.9.2 Managers' responses

Delicate situations

The managers all had in common the fact that they are often the person who first notices, first hears or first has to address the situation which arises when performance standards are not perceived to be met by a volunteer.

*She seemed to stop trying, she was asking me to pick her up and take her home. In fact she was becoming a bit like a client...you know pick me up...take me home. (M)*

Managers talk about their feelings when they perceive that changes have an impact on older volunteer's ability to volunteer:

*oh god, I didn't know what to do, I hope I never have to come across that again, thank goodness [name deleted -- more senior manager] just kind of stepped in and...(M)*

Phrases such as:

*it's a very delicate situation (M)*

*some volunteers have been a little put out by it (M)*

*I find that quite difficult (M)*

*had no choice but to take them out of the program (M)*

reflect some of the tensions of the managers.

Often the first response of the manager, and of some of the volunteer peers, is a temporary internal response. It involves an internal dialogue:

*I think to myself. (M)*

*I kind of try to work it out. (M)*

*Well, you sort of wonder. (V)*

Some take a "head in the sand" approach, hoping that some other solution will present itself before any action needs to be taken:

*No [lengthy pause] I've noted that a few times [pause] and one in particular had a death in the family, and she seemed to go downhill quite a bit [lengthy pause] but she's slowly coming back. Yes, there are some that I think are getting close to, maybe leaving, which would be fine. I think to myself, well, it would be good if they did, I'm not about to, at the moment. (M)*

or that things will improve:
Well, that's the hard part actually, I'm not sure about that, maybe they do, and just like any one else, you know, when your performance is not up to it, you just think, 'Oh, I'll get over it, get better.' And, yes, I'm not too sure, I haven't really come out and said anything like that to them, mainly because I feel that they are older, they've been there and done that. (M)

The reference to "they are older" seems to be offered as a reason for not taking action immediately.

More experienced managers still expressed an emotional response and concern about having to manage changing performance. One manager described a situation from her previous role, where she had "worked up to" managing a situation where a volunteer had become "more like a client" in an organisation where the volunteers where providing services to older people. This situation, reported earlier, involved a volunteer who was encouraged to become a client and no longer volunteer in the kitchen:

'It was very difficult because she still wanted to make herself useful to the, you know, at the same time you still want them to feel that you know they are part of the place. (M)

Anxiety about managing the situation was expressed by managers, with some having a more pragmatic approach than others:

'I always worry about what I should say, and what their reaction will be, but, you know, in the end you've just got to do it, don't you. (M)

Some managers reported feeling some doubt that they have noticed any difference in the behaviour of the individual, and in their uncertainty about whether they can do anything anyway, take the path of inaction, waiting for further evidence.

'It can be quite hard, you know, to see this person you've worked alongside not quite following what is going on. (V+M)

'I guess to start with I wait and see. sometimes I think I might have misjudged, or it might just be a bad day, you see. (M)

This internal dialogue, or process of sensemaking, was actually reported by one manager:

'I kind of sit there and think, is it important? Should I do something about it? What if I'm wrong? Can I really handle this? (M)

Sensemaking is an important element of the findings of this research.
Can I really handle this?

The feeling of being ill-equipped to manage what they consider to be a sensitive and somewhat inexact problem, and a need for training, was expressed by one manager:

I have found that very difficult, and maybe I have made that a bit of light hearted approach about it, because I haven't, I feel that I need some training in how to deal with that. I don't know how to deal with someone that sort of maybe is not up to standard. (M)

There is no reference here to "older" volunteers, merely to standards. That same manager was currently faced with a situation where they felt that there may soon come a time when they would have to take some action:

I'm not too sure what it is with him, but I just don't think it is hurting by letting him go on too much, because it hasn't got to that stage. If anyone got to a stage where really someone has got to come and do something about it, then it would, I'd have to force myself, I'd have to do something about it. (M)

Similar thoughts about learning and training came up elsewhere as well:

I'm not a business person, I've not trained (M)

I think I've got to learn to cope. I do think you need to make allowances for older volunteers, but there, I guess, if I was, you know, trained to deal with this a little better, if there was further help in how to deal with that, I sure I would cope. It would all be a lot happier. (M)

On this occasion the manager is referring to making allowances for older volunteers, as well as to training needs.

It could be me

A sense of "there but for the grace of God go I" is a response which also influences the actions of the observer or fellow volunteer. In my earlier study one of the responses which emerged here was the propensity to make observations to others outside the environment in which the observation had been made, for example, family members.

My wife is a volunteer at another organisation, and the old bloke there is doing [identifying word deleted] research, and he is very, very learned but he now has Alzheimer's or something so it doesn't really matter. We were only saying the other day, how in the heck are they going to get on because he probably doesn't even realise. (Paul, 2000, p. 136)
The fact that this volunteer’s wife has had a discussion at home about another volunteer can be interpreted as a sign that the magnitude of the problem is such that volunteers feel the need to share and discuss it. More importantly, the volunteer’s discussion with her family seems to reflect both a practical and an emotional element in the concern.

There were many comments in the group discussions which reflected a sense that many of the volunteers were well aware that changes in capability could just as easily happen to them:

*It could be any one of us really (V)*

This was stated by one of the men in the midst of an active discussion on the sorts of changes they had all witnessed in a fellow volunteer who, in the words of one group member:

*has really lost the plot lately (V)*

Such a comment was reflective of similar statements in other discussions and was met with sombre nods and expressions of

*you’re right. (V)*

The group still did not come up with agreement to take action, suggesting instead that one of them should talk to the manager if things did not improve. It was obvious some of them had compared notes on this previously:

*I was just saying to [name deleted] the other day, wasn’t I, that [name deleted] had been a bit, a bit, what did I say [name deleted]? (V)*

*Well, I agreed, you know, but it’s a bit hard to put your finger on it isn’t it, it’s like some days, she’s a bit (V)*

*You mean the one with the [identifying description deleted] oh she’s just lost the plot lately, I mean (V)*

*Well I think that’s not quite what I meant....] [spoken simultaneously, [name deleted] I wouldn’t be so harsh ] [some words lost You can’t say that... ] [maybe up to 6 speakers [name deleted]! ] (V)*

*He’s right though, isn’t he? I mean, she’s not quite (V)*

*But she’s always so reliable, and so efficient, and (V)*

*Well, maybe she’s been under the (V)*

*I hope she’s okay (V)*
Murmurs of agreement (V)

I mean, it could be any one of us (V)

This sense that the discussion could easily be about them contributed to the sensemaking process, with the volunteers comparing notes about what they had seen as changes in this individual, and seeking to find a consensus on what exactly had changed. This dialogue was somewhat guarded, with the concern of some for the individual about whom they were talking being coupled with respect for her previously good performance, and for her wellbeing. The process of seeking shared understanding fits with the intersubjective nature of sensemaking identified by Weick (1995).

Once the processing of the situation has occurred and some form of sensemaking has taken place, people (managers and volunteers) take action.

5.9.3 Manager action

"Well, first we have to talk to the person"

Communication directly with the volunteer is the approach first mentioned by all of the managers when they describe their actions in relation to particular examples where they have perceived that a volunteer is no longer performing to the required standard and they have taken action:

I've had two in my time here. One was a lady who had exactly that same problem. She was feeling too old and too obsessed with the [client], she was actually becoming personally involved with the [client] [identifying details deleted] and we just virtually had to, I had to go and say, you know, sorry but you know, I had to find the words... but as co-ordinator you do it as tactfully as you can but... you do it direct (V+M)

Well, first we have to talk to the person and find out what's going on, but. (M)

Managers report that at times the reaction that they get from the volunteer suggests to them that the volunteer is unaware of the issue or problem which is being discussed:

We would have a talk with them and, and [repetition in original] sometimes they, they are either a little too opinionated or they are a little bit too strong with the clients. a little bit and they, they go "I thought they were... Oooh... I thought someone loved me". (M)
At other times the managers indicated that the volunteer response indicates that they have been waiting for someone to say something:

_I had to ask this one lady, she was here a long time, I had to ask her to stop because everyone was afraid for her, and she, she seemed relieved to be asked to slow down, you know, like she felt obligated or something, and we had to reassure her that someone else would do the work and it would not get forgotten, that the work she was doing was important, you know? (M)._

Generally, managers like to have an alternative to offer the volunteer:

_I just said to him that I didn't think he was appropriate in [the venue] but... it's a bit like when you apply for a job, there are some jobs which you are suited to and others which your talents aren't...and I just said to go back to the [identifier deleted] and speak to such and such...you know...they will find you...you know...there are millions of other ways. We try and do an alternative thing, you know, so that's a, that's a, that's a thing on a volunteer, you know. (M)_

We try and do an alternative thing

Ideas and suggestions evolved during the discussion in some places, and this is explored below under methodological influences. In one organisation, however, the volunteers were talking about the social needs of volunteers which keep them coming to the organisation despite being less capable of undertaking the task for which they volunteered:

_So in other words, organizations need to, perhaps if they are looking after older volunteers, to have a second stage of volunteering which keeps them included in the organization, when they are no longer are active older people but aged active people. (V)_

It is interesting to note here the distinction being made by this volunteer between active older and active aged, implying perhaps that the volunteer can still get out and do things, but not to the level previously experienced.

This concept of an alternative option for those who are seeking to (or are asked to) withdraw from the mainstream volunteer activity unfolded as a search for mutual knowledge in the Voluntary Association – Organisation 5.

_In other places they use associate volunteers and they still have a sense of the social contact which is what a lot of those people are needing but it is not any risk to [the partner organisation] you know and there may be the odd occasion when there are things to be done where they can help out with training. (V+M)_

The group did decide that the opportunities for these volunteers might be
Pretty limited though...wouldn't it? (V)

and that some of the elements of offering associate membership might not be workable:

And if you've got to the stage where you are not able to attend your duty then you are not usually at the stage where you can come out in the evening and well we need to come out in the evening to attend the meetings and so that is a problem with associate membership. (V)

countered by

No I don't see that as a problem. With 'associate membership', the option is there for them because it is a social [option] that they have...if they choose not to meet that – [take up associate membership] they will gradually slide out of it rather than be told 'Right! Lifeline is cut!'. (V)

And it would still give them the amenity they can still come to [the partner organisation]. (V)

Yes and social events. (V)

As mentioned previously, social contact is cited by managers as well as volunteers, as one of the reasons volunteers might continue to volunteer even when they feel their capabilities are changing. Note the reference by the first volunteer (above) to volunteering as a lifeline in this context.

Eventually she accepted

The options available to managers when trying to offer the volunteer alternatives depend a lot on the nature of the organisation and the range of volunteer positions within it. In some organisations the options also include a transition to client. In one example of this the volunteer was a little reluctant despite her increasing disability:

Yes, we eased her across as easily as we could. I mean because she had been coming for quite a long time. She was much loved by everyone there and we didn't want to lose her. She was seeing herself, and she was recognizing herself, that she wasn't physically able to keep doing it, but at the same time she was reluctant to give up, the, you know, the actual being there. She, it was part of her routine and all of that. (M)

The response was to

Say to her that, no, 'Do you still want to come? Look things are getting a bit difficult, don't you think, in the kitchen. It's a bit difficult for you to be moving around. It's getting hard for you, but we know that you
love talking to everybody here, and they love talking to you. They look forward to every week, the clients look forward to talking to you, so why don’t you come and join us there as a client? Because now that, you will be eligible, you have got a bad back and eventually she accepted that you know this stage of her life that she had now come to, after volunteering there for many years. (M)

This feedback from the manager to the volunteer, and the availability of the transition to client as an option, are important elements of the management of this volunteer. In describing the management of this transition for the volunteer, this manager moved from “I” statements to “we” statements, indicating that the management of this sensitive situation had become a collective responsibility. Quite a lot of time was spent encouraging this volunteer to change her status to client and the emphasis on “eventually” when talking about the outcome was considerable and contained a sense that relief and exhaustion had been felt by the manager at the time.

Managers take pride in what they see as “success” in trying to “manage” changed capabilities:

We’ve had a couple of volunteers who were what I would describe as aged and the clients have adapted beautifully [to the changes]. One was a lady and one was a gentleman, and when they found volunteering a little bit hard or it didn’t really fit them I put them in the [different kind of venue for clients] and sat them in a corner as a kind of grandparent. They were just there [like a] grandparent. One of my ladies actually went to [name of volunteering venue removed] and she had a fall in her home, and I went to visit her and you should have seen the lovely mobile that the kids wrote. Little hearts with all these messages to her. (M)

The manager here saw the availability of options as contributing to the “success”:

So even, I think if, it’s not possible in all organizations, but in our organization, we have a step that you can include volunteers in without having to reach that stage where you need your full faculties to cope. We have a program where you can help and include them, you know, and I think we are fortunate that way. (M)

They also reported outcomes which they were disappointed with:

I remember one in particular at [another organisation], he left, because, as I was talking to you about local government have very set rules, and this particular volunteer was becoming quite, a very volatile man, a cultural background, [ethnic background deleted], very, very sensitive and I’m told becoming more so, I don’t know. (M)

The manager, then relatively new, reports having to stop the volunteer from operating a piece of machinery for safety reasons:
And this guy who was actually on the staff, a really strong big hulky guy, worked it out, and he had hurt his arm. This particular guy, this volunteer had worked out there was something wrong with it and he wanted to show me how you operated it and I said to him, we had a rule, absolutely no volunteers were to operate this but he wanted to operate this... [and he knew it was] off limits for him to actually do it he was very annoyed about that, and he said well you know basically, you know, 'if I can't do it I'm of no use to you. I'm out of here.' I said 'well please don't have that attitude that's not what I'm saying. What I'm saying is I don't want you to hurt yourself, and if this other person can, and he was a huge fellow, then you could, too.' (M)

She reported the aftermath of the volunteer leaving the organisation:

I felt really terrible, but you know, when I spoke to the [identifier deleted] managers they said, 'You did absolutely the right thing, if he'd hurt himself you would have been liable'. (M)

It is important to note here the emotional response of the manager being weighed up against the safety of the volunteer. “Success” in the management of declining performance is likely to influence the actions of managers on subsequent occasions and to add to the body of experiences which the manager draws on when an “interruption” occurs.

5.9.4 Volunteer awareness

Volunteers are aware of how sensitive the issue can be

Volunteers recognise that a manager faced with managing an individual whose capabilities have changed has a difficult situation on their hands:

That is one of the problems with older volunteers, sometimes they go past their use-by date, in a nice way. They might be physically, they can do other volunteer jobs, sit at a desk and do something. It could be physical, it could be eyesight, hearing or something else. It could make them, reduce their efficiency, so you've got to, in a nice sort of way, say to them, 'Look old boy, you know perhaps you should try something else.' You've got to be very diplomatic, but some people can take that and others will be very offended by it. (V)

It's quite a responsibility. (V)

You have got to do it... but it's not a very nice thing to do, is it? (V)

Which is more important? (V)

If you explain to the person... I think. (V)

213
You have to do it carefully...how you announce it. (V)

Some had personal experience and understood some of the difficulties first hand:

I have done it in certain circumstances. You’ve explained it, to the person. You explain to the person why you are going to have to make that change. You go through it in a really diplomatic and nice way and so and reason with the person concerned and so eventually you come out at least with his agreement or her agreement and hopefully it’s going to work. Sometimes it doesn’t of course...and then. (V)

and they recognise that they, too, might be the person about whom the manager is concerned, indicating a preference to be told rather than have the situation continued:

Depends on the organization. If he has the responsibility, to go, rather than down to one person, even if it hurts, even if it, in the situation. It comes to the point that they are in the situation [and] we [referring to volunteers] have to be smart enough to accept the situation. (V)

The role of the organisation is interesting here.

But they would prefer to know

Volunteers were in agreement that they would be hurt by being told that their capabilities were adjudged to be changing:

No, I would not like to be told about it but hopefully I have got the maturity to see the wisdom of being told of it. (V)

You’re all going to talk about being mature and you should be able to. (V)

Exactly, but I can honestly say I won’t like it. (V)

No. (V)

Not at all. (V)

No-one likes to be told that he’s not good enough. (V)

That’s what I mean. (V)

but they would rather hear directly of the situation:

But I do believe that most people of our age, even when we get aged, we appreciate the respect of being told directly instead of being patronized, by some little foible of an excuse. (V)
This was a saturated category in the data. In all of the group discussions there was a strong pattern of volunteers wanting to be told if they were not doing what they should be doing in their volunteer work:

*Someone should just tell me.* (V)

*I would rather know.* (V)

with one volunteer asking a colleague to take responsibility for this:

*Promise me you will tell me, won’t you.* (V)

Many of the ideas and suggestions which came from the volunteers who had not really previously thought about this situation in any detail assumed that while the volunteer may no longer be able to undertake one particular activity this was not necessarily the end of their volunteer activity:

*And I think...being honest with, it’s very difficult, I can understand that and you feel compassion for volunteers, but I think, in the end, they would probably really appreciate, I think, and respect the fact that OK this isn’t working and maybe, like they have to do now with people who are retrenched, they virtually offer, suggest alternative, alternative places where they can go. Maybe even take them personally to say somewhere like your local volunteer resource agency, say for now look this is getting a bit difficult, you have so many attributes, maybe we can find something, that is a little bit more suitable.* (V)

but this provoked a response which indicated that perhaps suggesting that there might be alternatives is not always appropriate, and is possibly disrespectful:

*You lose, it’s a step down in your independence, isn’t it. One recently, they told this lady while she was there, she was 87 I think, ’Your eyes are not good enough’. We’ll do this there, then we’ll do something else, then we’ll go back to the doctor, and have another check’ and all this rubbish, instead of saying ’Look darling you can’t, you can’t drive any more.’ I thought that was the cruellest thing that could have done – to tell that lady, ’You have really done very well, but you know, you can do this, then go back and have another test’ and la la la. O ooh well [tone of disappointment or sadness]...and in the end...it was going to end up...being...[long pause] it just broke her heart. She thought she was going to be all right, and then the next time somebody else had to say, ’No, you can’t drive love, you know’ It’s very cruel to deal with people like that. It’s like somebody with a terminal illness, you don’t let them know until...You’d like to know right there and you can deal with it.* (V)

On reflection, it is likely to be the lack of a direct discussion which “broke her heart” rather than the offering of an alternative.
5.10 SUCCESSION

Despite its being an aside in terms of managing declining performance, the idea of succession was one which concerned volunteers on a number of levels:

Well I belong to the [name of organisation] as well and they are really trying to start a drive to bring in younger volunteers because most, I'm young, I'm nearly 70, and there, the people there are much older than I am, they are up to 80 and sort of, and are getting quite decrepit some of them and they want younger volunteers to sort of take over, to continue on, and that was the focus of our meeting on Monday and how do you get younger volunteers. (V)

to which another individual added

and how do you keep them once you've got them. (V)

Succession has two sides to it, the finding someone to take it on, and the letting go and handing over:

But in the other thing that I belong to there are people who have had every major job within that, as volunteers you know. It's amazing that in the end they have to step down because of the three year limit but they don't really step down if you know what I mean. They are kind of, people, although you've got the job (President as it happens) but people will still go to them because they have done it for so long and in some cases you have to refer to them because you don't have that background. But it's sort of strange that, you know, they are kind of glad to get rid of it but they are not really they still want to, they want to have their say.

hang on to things, and it makes it very difficult for those people who would grow in to the job left alone, you know. (V)

The concept of succession speaks directly to one of the issues discussed above about the reasons volunteers stay in organisations even when they no longer feel capable. In terms of discussing options some volunteers felt that bringing in someone to learn the job, either with a view to succession, as a buddy, or as an option which could be offered a volunteer who was beginning to find the work difficult:

All you need is someone who is willing to learn, to share the work, to, to, to, well, to take over, but gently. (V+M)

But this may not always be met with the same response. Remember the volunteer who was brought in to take over the book delivery programme but who could not be taken on because the volunteer did not want someone to take over from him:
He didn’t want somebody taking his job over, but they really needed somebody, because he was fouling up, that’s what it boiled down to.  
(V)

To this point the data which has been examined has shown some of the areas where managers and volunteers see things a little differently, but has in the main revealed a general level of agreement about many aspects of the issue under investigation. The next section will examine the reactions and responses of managers and volunteers which are more about the interaction between managers and volunteers.

5.11 VOLUNTEER REACTIONS

5.11.1 Task oriented management response

Naughty children

One type of action from managers appears to be more focussed on the task. At times this involves either taking away the volunteer’s responsibilities without consulting them or

*dealing with us like we are naughty children.* (V)

At first I thought that those who expressed frustration and impatience kept these responses from the volunteers. While waiting for a pre-arranged interview in one of the organisations I was able to hear a very patient manager listening to and talking about rosters to a volunteer who was obviously a bit hard of hearing (the manager was talking very loudly and repeating herself over and over). The manager, with head in hand listened, repeated things for the volunteer and made sure the volunteer repeated things back to her but her tone became at the same time both condescending and frustrated as the conversation progressed. At the end of the conversation it was apparent to me that she had found the conversation frustrating and exhausting as she sighed and put away the papers she had been referring to. Her comment as we walked to where we were to conduct the interview was that this volunteer had become

*a real nuisance and really should move on. Her hearing is so bad that phone conversations take forever.* (M)

she said

*and I don’t really have the time!* (M)
Interpretation of manager’s actions as impatient, intolerant, uncaring or simply rushed and task focussed were more often reported by volunteers in discussion of other organisations than reported by the managers interviewed. Some managers reported a sense of frustration

*It can be really frustrating, like, it’s, you just have to be patient and tell them again.* (M)

One manager referred to some volunteers as nuisances:

*They become a bit of a nuisance.* (M)

The managers talked of the time factor, and expressed frustration at the time it can take to provide support and assistance to a volunteer whose capabilities are changing:

*I haven’t got time to focus on just one volunteer, I mean it’s not as if they are a client, but well, it’s.* (M)

The volunteers are very clear that the relationship they have with the manager is an important one, as discussed earlier, and feel this is more so when a volunteer is in need of support or help.

*I mean, it’s not like we can just do our own thing, I, I, I, we, we have to, she has to be there, it’s like, she’s important. That thing I was talking about earlier, with the memory thing, with that volunteer who gets mixed up, sometimes it’s like she, she, this co-ordinator, in this other organisation I was talking about, she sighs and gets sort of umm, she should be more, more, spend more time, not brush her off, you see?* (V)

I have a sense that even highly regarded managers can resort to impatient or frustrated behaviour when the goal is important, and the changing capabilities of the volunteer are slowing progress:

*You don’t often see that, I mean they are all so, but I think she was out of her depth. He was, he was really bad, his attitude was, I mean her attitude was, well he couldn’t help it and she seemed to be under pressure so she sort of scolded him, not scolded him but.* (V)

Another volunteer added to this comment:

*I’m not familiar with the organisation but did she not have support? I mean if she, if it was the first time she, if they set goals, maybe she was under pressure. I’ve seen really good managers go under pressure when they don’t have support or don’t know, are not experienced. or it’s about pressure.* (V)

A third commented about the manager in the current organisation:
Well, we all know that even the lovely [name deleted] gets impatient when you are too slow, or she’s got...it’s getting close to...we need to finish (V)

and the second speaker added:

Well, she hates it when I have to ring in because I’ve forgotten what day again [laughter]. (V)

The third speaker commented:

But she’s usually great, even if she does go over the top a bit with the “how are you darlings” sometimes. (V)

This type of reaction by the volunteers was grouped during thematic analysis as being a response to task oriented management approach to managing declining performance. The grouping of these reactions under a node which labelled the management response rather than the volunteer reaction was one which revealed two other types of management response: people oriented and partnership.

5.1.2 People oriented response

“She does go over the top a bit”

A second type of reaction by volunteers was grouped during thematic analysis as a response to people oriented management approach to managing declining performance. Managers talked about “my” volunteers in the way that parents talk about “my” children, and at times with a tone and approach which was warm and almost gushing. This is in contrast to the impatience and frustration which is discussed above. Even the same manager could refer to a volunteer who had been “retired”:

She was an absolute gem, but she was just not up to it any more, she got kind of vague, so we gently encouraged her to come less and less, and then she sort of retired, and we see her once in a while but she’s no longer a volunteer, we kind of gently ummm yes, retired her. (M)

Managers are caring and concerned, but at times the volunteers found them to be vaguely solicitous and somewhat overly tactful. Volunteers also found managers to become patronising and belittling or resorting to careful avoidance:

We just kind of divert them, you know, the work has to be done on Tuesdays now so we’ll find you something else to do. (M)

It can take the form of adopting an approach which is ranges from somewhat to extremely patronising, treating the volunteer as a “poor old thing” or taking away
duties or activities for reasons which have been invented to avoid hurting or upsetting the volunteer. Volunteers who responded to the survey reported resenting being called “blossom” and “dear” (see Chapter 4 on context). Those in group interviews did not want assumptions to be made about what they can and cannot do (discussed earlier):

Well, I think that in a lot of cases they think ‘I won’t give that job to you because you are, you know, you’re not strong enough to handle...or your back, you have a back problem, you know, because you have gone through all that sort of rigmarole, so I think they tend to pick you out to do certain things. They really should just ask you...you know. (V)

Recall the case of Elizabeth (Scaled section) who wanted not to be given busy work and was hurt and annoyed at sweeping a clean floor. The people oriented management response led to frustration in the volunteers, particularly when they felt patronised, or were aware of the fact that they were being bypassed.

Volunteers were also aware that there might be times when changing cognitive capabilities make it more difficult to ask a volunteer directly about their capabilities. In one group the discussion about the partner of a volunteer who had lived with dementia in his final years led to consideration about how easy it is, or is not, to just ask an individual whose changing capabilities include cognitive skills.

But they can become just like a child... You have to decide for them sometimes. (V)

This discussion led to this group learning from her experiences and this is discussed later under methodological influences.

5.11.3 A partnership approach

The concept of an active discussion between the manager and the volunteer before any decisions are made has been categorised as partnership in the thematic analysis.

You just have to be up front with them

Quite a lot of the time managers are matter of fact about the possibility of changing capabilities, and as was reported in the context chapter, they don’t identify this as a “problem” They view managing performance as part of their role, and take a direct approach and talk to the volunteer. The evidence in the data is that managers, peers and key others in the organisation employ this response most readily when the
performance appears to be declining due to a physical decline. If the volunteer can no longer lift the heavy boxes then talking to them about this and seeking alternatives to lifting is undertaken often as a matter of course.

*You just have to be up front with them.* (M)

As has already been discussed the volunteers seemed to indicate that this approach is the one they would prefer:

*I'd want to know, I may not like it, but I'd want to know.* (V)

A very small number of volunteers said that they were not sure that this was what they wanted, but none indicated that they would prefer not to be told.

**When a volunteer is unaware**

It becomes complex, however, when the volunteer is unaware of their own changing capabilities:

*You want to talk to them about it, but they are not ready, or not listening, or not, or, or, or, they don't remember.* (M)

In such a situation the managers feel that they have no choice but to make decisions on behalf of the organisation, and make arrangements to prevent the volunteer from continuing:

*I had one, I just had to contact the family, I had to say to them we can't let him do it any more, it was really sad.* (M)

What remained unresolved in most discussions with the volunteers was the question of the approach the manager should take when this complex situation arises:

*I would sincerely hope that if I was in that situation someone would do that for me, take me by the hand and lead me out of the place.* (V)

*Even so, if you are still not capable of doing what you said you would do, I personally would rather be told.* (V)

*If that were the situation for me, that they would just come to me and just say, you know, in the right sort of way, 'Look you know, we don't think you should be doing that any more'*. (V)

*But if you can't understand what is happening to you, or you don't think they are right about it, if you think you still can, then who is to say who is right?* (V)

Sometimes managers find they are unable to talk to the volunteer directly if the volunteer's changing capabilities have not been addressed early enough:
I guess I inherited this situation, and it would not have been so bad if I had been able to sort it out earlier. (M)

Or if the situation has deteriorated quickly:

I just went home and cried, it was just so sad to see, for all of us to see, but it was really fast, like, here today, and here but not here tomorrow...and we just couldn't leave it like that. (M)

The emotion and anxiety being experienced here by the manager are evident in this statement, as is the way in which the changes in the volunteer have been noticed. Once again, and most importantly, however, this sort of situation, while definitely occurring, was relatively rare:

Well in all my years, and there are a few miles on this body, I've really only seen it that bad once or twice, most of the time there is warning. (M)

The evidence is that occasional occurrence of changing capabilities causing the manager angst is lessened where there are systems in place which pick up the changes early, and which provide the manager with tools for action.

5.12 THE PEPPING APPROACH

One organisation had an approach which had evolved within the organisation and which addressed some of the issues which have been raised by the data. In this context I have referred to this approach as PEPping. The volunteers and the organisation have developed their own term for the process but to use that term would make the organisation immediately identifiable. The term (for which I have substituted PEP) developed from an abbreviation which has become its own word within the group, and which has its own meanings and connotations which are discussed later. At this stage it is simply appropriate to know that PEP stands for Peer Evaluation Process and refers to the particular PEP which has been developed by this group.

In the Voluntary Association, a peer evaluation process has evolved. This evaluation process is one of a set of processes which have been introduced by the association in co-operation with its partner organisation, which include recruitment, training and mentoring processes to aid in assuring quality performance by volunteers. The recruitment process runs into the initial training.

When we were recruiting volunteers for the last training course... age wasn't a consideration... [but] some of them were so dodderly that they
couldn't get past the interview...I think two or three of the applicants...they were felt that...not chronologically but...physically they had probably gone beyond what we were looking for we felt it was questionable that they would be able to carry it through. (V+M)

If somebody arrives with an obvious disability which would not allow them to do [the volunteer activity] properly we would not be encouraging them to be a volunteer. (V)

We have 14 weeks training, half a day a week is involved. The fundamentally important part is the interaction with people, communication and information. (V+M)

They also have a probationary period, with a mentor. (V)

During the discussion of the probationary period the volunteers identified a flaw in this aspect of this system:

Let's say one of the mentors was taking one of the new volunteers around helping them and felt 'good grief this is hopeless' I think they would tell someone but it's not formal, it's not built in and perhaps it should be. (V)

I have a problem with the probationary period, in that there is no feedback from the senior volunteers, the mentors. (V)

The evaluation process (PEPping) was recently reintroduced in a modified format. The early attempt, mostly based on bringing in an outside trainer, was estimated by the volunteers to have been eight years earlier and was not regarded as having been successful:

That was a dismal disaster, about 30% participated and [the partner organisation] sort of gave up after that. (V)

The revitalised process has as its core evaluation by peers. The project is overseen by an elected working group which reports to the management committee. Volunteers who participated in the group discussion told of the development of the process:

It sort of became obvious that [the partner organisation] were interested and entitled to know that their volunteers were doing a reasonable sort of job...there are no observers around, just the public, nobody knows what has happened and so [the new system] sort of evolved about three to four years ago. Negotiations went backwards and forwards trying to get a system. (V)

It became apparent that it would have to be done internally...we would never expect to employ a person, just because of the time commitment...it would cost an arm and a leg to do it...so an internal system was evolved...that was one where the body of volunteering
would nominate people who they thought could do the job reasonably communicative, was friendly and could pass on information and so on and from the list of people this PEP group was formed. (V)

Volunteers could ask someone [from the group] one of them to evaluate them on this particular activity...for another one they would have to invite a different PEP person...and it evolved that everyone would be PEPped once on their duty in [volunteer activity] and twice on [separate volunteer activity]. (V)

There's quite a few hiccups with that because some volunteers only do one sort of [volunteer activity] and they don't want to be PEPped. (V)

As a result of one activity the evaluator the PEP member fills out a form at the conclusion, and the volunteer is asked to fill in one and then they sit and talk and compare notes. (V)

Those two pieces of paper come to the PEP group where it is discussed in some sort of fashion. (V)

There are three categories...basically you are excellent or good or you ought to be PEPped again with a different PEP member. (V)

The system is still evolving, and at the time of data collection was into its second full year with the new system in place. The development and introduction of the system was not without its problems.

There was some resistance from a few volunteers saying 'we are volunteers, why should we be PEPped? If you don't like us or sorry if the [partner organisation] don't like us they can get rid of us' But [the partner organisation] doesn't know whether they are any good or not in any case unless there is some sort of system. (V)

In addition, deciding the categories of outcomes was not without challenge:

There were differences among the PEP members but a third category at the top end of excellent...(V)

Some people who were given 'excellent' challenged that and said 'Look, I'm not really that excellent. I'm not really that good so probably'...but that was done deliberately to encourage them and say that they are basically pretty good volunteers. (V)

It was treated as a basis for encouragement...to build their confidence...to encourage them to improve their game rather than to be...er critical. (V)

Discussion of the outcomes from the first full year of operation of the PEP system at first seemed to indicate that no performance problems had emerged but as discussion went on some evidence of this came to light:
After those reports went round the table the volunteer got a letter saying that it was excellent or something or other they would also get a letter saying something was a bit shady or something. (V)

In a couple of cases we have assigned a PEP member to approach the person and say 'can I help you' then repeat the activity...we don't, we never, well in one case we got to the stage of saying because you haven't repeated the evaluation satisfactorily you cannot do that activity but that person has changed activities...we just took them off that [duty] where they weren't satisfactory but I wrote the letter and the committee was responsible, of course. (V)

In this case it became evident that the structure of the team/committee helped in a sense that they had each other to help work out the best course of action:

We also have the situation where someone has resigned and sought communication and there are issues there and we automatically go through [name deleted] the [partner organisation] person responsible and we can work it out so that issues can be resolved. (V)

By operating an evolving process on which people can have a say, over which a designated group has oversight, and for which the group changes and evolves as well, the volunteers have the chance to address issues and problems which arise with the process. Similarly, by having a team/group to oversee it there is dialogue about the situations which arise, and how best to manage these. Finally, as the process has evolved from within the group, and is dynamic, it is largely accepted by those to whom it applies. New recruits have the chance to opt out by not choosing to volunteer with the organisation once the training and probationary processes reveal the system to them. Most of the resistance to the process occurred in the developmental stages from among existing volunteers who were not comfortable with performance management. Both the manager and the individual in the partner organisation spoke of those who were not comfortable with the process, but indicated that some of the difficulties which had been posed by changing capabilities among volunteers had been able to be addressed in a fair manner.

It doesn't mean we don't have to deal with some of these people who think they can do more than they can, it just means we know what to do better and we find out about it before we hear complaints. (V)

The discovery of the operation and benefits of the PEPping system contributed to the analysis and development of theory beyond contributing an example of what is happening in one particular organisation. There were aspects to PEPping which led to the saturation of categories across the whole study. The similarities and differences
highlighted by exploring the PEPping process are considered to be methodological gains contributed by following both a theoretical sampling and in-depth interview approach to gathering data. One particular example of this is the ease with which the group discussed the concepts associated with performance and ageing. Methodological gains are discussed further below.

5.13 RETURNING TO CONTEXT

At the opening of this chapter the subsidiary question relating to context was reported, and the data with regard to "Who are older volunteers?" was discussed. We now return to the broader question relating to context.

Question 3: What are the major contextual factors which are contributing to those experiences?

The original aim of the questionnaires reported in the previous chapter was to explore the context in which the study was taking place. The surveys contributed some background which informed the interviews in the next stage of the study, and elicited some context data which was reported in the previous chapter. This next section highlights and reports on a category which emerged during data analysis which provided greater insight into the context in which the management relationship occurs, namely, the comparison between volunteering and paid work.

5.13.1 The spectre of paid work

As you will have noticed throughout the data to this point, often the actors make and use as an anchor, comparisons with paid work. The spectre of paid work seemed to be lurking in the background all the way through the study, and at times it was a very real comparison rather than just a ghost in the distance:

I'm actually in an administrative role, but I am a volunteer and you have to be also like a boss in a paid position and as a volunteer that puts sort of a different stress on you. (V in a managerial role)

But it also has its drawbacks, too, in that if I was a paid person I would have to, I would be required to present a resume, they would want certain skills, whereas in the country towns...if you've got somebody who is a volunteer that is prepared to put up their hand and say yes I'll go along to the schools and make sure the other volunteers are doing well and that...you grab them. (V in a managerial role)
As has already been discussed, this is, at times about the volunteers’ relationship with the paid staff:

jobs that paid staff might have for us to do like opening mail sorting out raffle books at the moment because there is a raffle going on. (V)

or about the division of the work within the organisation:

and that’s a job, I should say a volunteer’s job. (V)

Often the paid/unpaid distinction is about status:

I mean you only think of yourself... as a volunteer. (V)

I'm only a volunteer... I don’t work here. (V)

But in one case it is about the extra satisfaction which comes from volunteering over paid employment:

But you get more satisfaction out of it... if you are not doing it for money. (V)

Much of the data which was coded as being in the paid work category was coded into other categories as well, including being managed:

Really, volunteering is just like running a business. (V)

In fact you can feel like you are going to work sometimes. You are an unpaid workforce, that’s what you are. (V)

But that unpaid status, because you don’t get paid, you’re of no value, we’ll just use your time. (V)

and being respected:

But the people that are in the paid force, they look down on you and think, she could be getting paid for doing that. (V)

Some data was very pointedly about the distinction between paid and unpaid work:

Well, I have experienced it from time to time in that, there’s, there’s this... people when you’re being employed for wages, it’s your duty to do this, this and this, and they accept that you’ll do it, and get on with it. Sometimes in, as a volunteer, there’s this, a bit of babysitting and a little bit of patronizing, from time to time. I’m not saying it’s here, but it’s around, and there is also sometimes a bit of passing the buck, of undesirable things that they don’t want to do. (V)

Some work that the paid staff really don’t want to do, that can get shuffled. Oh well, the dogsbody’s coming in so we’ll get the dogsbody to do it, because hey who wants to do that crap. (V)

One volunteer reported that a change from being a paid to unpaid staff member in an organisation was reflected in the behaviour of people around:
It happened to me once, and then, because you like the organization, and you still want to contribute, you change your role somewhat, and the thing that can happen is you’re treated so differently. That it makes you really wonder what the difference is. ‘I was here last week as a paid employee and now you’re treating me lesser than, like I’ve lost my marbles, or that I’m not capable any more of ringing up a supplier, or organizing some stationery or something like that’, you know. So, once you were capable this week, you’re still capable next week, even though you may not be getting a wage. (V)

Another volunteer commented:

No, there’s just that little thing, that ‘Oh no! You can’t do that, you’re a volunteer, volunteers don’t do that, you know, we can’t have you doing this’. (V)

The outcomes of comparisons with paid work, both favourable and unfavourable, are examined further in the next chapter.

5.13.2 The status of volunteering

A complementary aspect of the context in which the study was conducted is the status of volunteering. This has been discussed earlier in this chapter with regard to being managed, but is also part of the bigger picture of volunteering. Some of the data here crosses over with the paid/unpaid divide:

In fact you can feel like you are going to work sometimes. You are an unpaid workforce, that’s what you are. (V)

I won’t mention any particular group, but it’s not this one, but that unpaid status because you don’t get paid you’re of no value, we’ll just use your time. (V)

and being respected by the general community:

I say, ‘Well, why don’t you do some volunteer work?’ ‘Oh bloody volunteers, do-gooders’. you know. You get that sort of response, you know, and then out in the community, there is still, it’s not as bad as it used to be but there is still that sort of response in some. (V)

As was discussed in the literature review, volunteering seems to be at the same time held in high regard as an altruistic act, necessary to the community for many reasons, but at the same time unrecognised and undervalued. Much of the data in this category was also included in other nodes and has been reported elsewhere. You may recall volunteers discussing the respect they feel from the organisation being reflected in who is appointed to manage them. Similarly, volunteers often object to discussion which refers to them as “just a volunteer”. The status of volunteering in the
community is further discussed in the next chapter as being important to the findings of this research.

5.14 METHODOLOGICAL GAINS

One further category became saturated during data analysis, with several areas pointing to the benefits obtained by the methods adopted for this study. The choice of an interpretive framework and qualitative data collection for this study was made because of a paucity of in-depth understanding on a matter which had been raised as a concern by managers of volunteers. This choice, as has been discussed previously, acknowledges the subjectivity of the researcher, and views the collection and analysis of data as a cyclical process. It also allows for the refinement and development of understanding during the data collection process, by researcher and participants alike. This next section reports on aspects of the data which reveal methodological gains in understanding which would not have been possible in a different framework.

5.14.1 Sensemaking

The first of these gains has already been highlighted in the data, namely, the sensemaking process encountered by managers and other witnesses to the changing capabilities of volunteers. There is evidence in the data that the sensemaking process continued on into the data collection process, and that during the interviews the dialogue approach to interviewing lead to the managers voicing their own thought processes. One manager, for example, commented:

I've been thinking about this since we spoke on the phone, you know, kind of considering it, and wondering if I have got it right. I mean if there is a right, do you think there is a right? I mean we try to do our best but, well do you think there is a best way to, I mean one way to, I, I, I've been giving it a lot of thought. (M)

My own response was to indicate that I was not sure that there was a one best way to manage any situation, to which she responded:

No, I, I, in thinking about it that's what I thought, but you worry, I mean I worry...am I seeing things, am I right in thinking someone is failing, I don't mean failing in that sense, I mean getting frail or forgetful or, well failing...and I worry if I am doing the right thing. (M)
Eliciting such thought processes adds to the depth of the data collection process, and contributes to the understanding of the sensemaking process of the manager faced with changing capabilities in a volunteer.

5.1.4.2 Progression in understanding

A second gain made by the adoption of interviewing and conversation is the progression in understanding and changing awareness among volunteers who participated in group discussions. In one other group there was some reluctance to talk about the effects of dementia which was almost tangible, until one volunteer indicated that she had recently returned to volunteering after the death of her husband, and that she had been his full time carer in his final years necessitating a total withdrawal from all volunteer work. Until that time the group had not ventured easily into the topic of cognitive change. At first I thought this might be because they knew about her situation and were being sensitive to this but, in fact, many in the group were unaware of her situation, and had not talked with her on a personal level previously. Once she identified her intimate knowledge of this sensitive subject, however, there was a slow and careful group effort at seeking understanding. She became the “expert” in the group on this particular topic, and set the record straight a few times when naïve or clumsy questions were asked.

Here is an excerpt from her explanation to the group about her experience:

I've had a husband who was, slightly, he had Alzheimer's, not Alzheimer's, but he had mental, what do you call it, dementia. And my close friend, hers was definitely Alzheimer's, and look it didn't matter how many times she told him, and they just don't see it, and they can get mighty, mighty stroppy, because you are trying to channel them somewhere else, but, but you really have to have, you know. (V)

Unlike during a lot of other segments on the tape where there is obviously background talking and other conversations happening around the room, or at least people making comments to each other about what is being said, this volunteer's voice is the only one on this section of the tape. She continues:

Like, in this case he couldn't drive any more. I can remember standing in the doctor's surgery, and I'm standing behind him and my husband is saying he has to go for his driver's test and I'm going, like this [I recall the speaker shaking her head and mouthing NO]. And the doctor said, 'I am not going to pass your medical. You will go for another test and the police, it will be up to the police. Then my husband had great pleasure in getting in and out of the car and, and he came to me one
day to get the key to take car around the block to try and do it, and I said, 'Yes, but I'm not helping you.' He went out, but he couldn't get into the car. He sort of was blocked, you know. (V)

In my mind's eye I see two people on my right lean in towards her as she spoke and on the tape you can hear the tone of voice of one of the men change and soften to ask comment on a volunteering situation:

But I'm sure, sorry [name deleted], but I'm sure that management would not want any volunteer to go from this group if they weren't capable of doing something. (V)

The conversation continued:

No...no...I'm saying that...there is a vast difference between dementia and just getting old...and perhaps slowing down...and not being able to do things. (V)

Another volunteer offered:

I had a very elderly friend, who was supposed to use a walker...He went walking. A month or two, towards the end of his life, I cared for him once or twice while his wife went somewhere. And he got up one day and he said to me 'I'm going to the loo', and I just stood up and said, 'No, you're not.' He looked at me, and I said, 'Well yes you are, but you are not going like that'. In his memory, he wanted to go to the loo, that was all right, 'I can stand up. I don't need a walking stick. I don't need a walker'. And I said...and I said to him, 'I'm not picking you up off the floor. You have the walker, the walking stick.' But ten minutes later he would do the exact same thing...Because they think back to the way they did it, in his mind he was still capable of it. (V)

The conversation progressed:

But don't you think yourself, like I hope that I would be able to think myself, well hey [hesitates] I can't do this any more, and maybe because I'm doing two days, say hey I'll cut down to one day...see how I go. (V)

And then, don't you know yourself, that maybe, sometimes. (V)

Hey I was doing this before...and now I feel I can't...surely you must know that yourself. (V)

If you are mentally losing it...you can't always...acknowledge. (V)

But that's just it...they just don't know. They can't understand that, they don't understand, they even get stroppy. (V)

One volunteer commented:

Oh I never thought of that. (V)
As a subjective researcher participating in this discussion I was able to see the
counts with experience of the effects of dementia educating the others in the
group on the impact it has on the individual's capacity to understand, and on those
around. It was suggested that volunteers could help in the identification of this type of
decline:

If we had a volunteer with us that was, what's the word? Dotty, not
dotty, but, you know, when we do our staff meetings and these things,
sometimes, and everybody, 'Look be aware'. We'd be looking, we'd be
thinking, and if it come to the odd time when, you know, four out of the
five said, 'Well, I don't want to take him or her, because...'. Then,
unfortunately, it would get handballed the manager and that goes with
the territory. They'd have to cut, they'd have to handle it from that
point on. (V)

In a subsequent group discussion in another organisation, one of the volunteers
revealed personal experience with a younger paid worker for whom the onset of
dementia was both rapid and unexpected and the same sort of cautious interest and
concern evolved in that discussion as well. Such a move in the dialogue is in keeping
with the idea that people constantly make and remake their world, and that their
interaction with it will change as they get a different sense of that world. The interest
of the listeners is apparent in questions like "what did you do?" and "what changed?"
The processes occurring in the group were also indicated by sounds on the tape such
as "ahh, mmm" and "I see" which are evidence that the participants are contemplating
the information.

Volunteers learned from each other and asked questions of each other about
this somewhat sensitive topic where they might not have previously. In one group
quite a number of people were certain that they would be aware of any decline in
themselves. Others were not as much certain as hopeful, and then there were those
who had first hand experience of decline in others.

Such debates and discussions were often quite charged with emotion, but
many of the participants indicated that they had developed a new awareness and
greater compassion for the individuals whose capabilities may be declining and for
the people charged with managing the situations. Not all of the participants in the
discussions made this progression in understanding, and one volunteer commented off
tape that those who are "beyond their use-by date" should "get out"[memoed
comment], even after a lengthy discussion on dementia.

232
5.14.3 Finding a common language

Allowing the discussion to follow directions dictated by natural conversation rather than using a rigid framework also led to some revealing data. The importance of opportunities to discuss the issue under investigation was commented on by a volunteer in one organisation:

*We never get to meet and talk about things like this, we meet, but not to talk about things like this, it's new to us.* (V)

This was echoed in two more group discussions. In contrast, in the PEP group volunteer performance has been under discussion for a while, and matter of fact discussion moved more quickly to the changing capabilities of volunteers with all the participants apparently sharing an understanding of what this meant. Comments such as

*We've often talked about this.* (V)

and

*Remember we talked about that the other day.* (V)

This group were comfortable talking about changing capabilities and had obviously given it some thought.

5.14.4 Emotional barriers

In one group interview there was a collective breath holding when a group member began to talk of a volunteer they worked with who they felt was no longer capable of the volunteer work they undertook, and a similar collective sigh of relief [almost inaudible on the tape] when the volunteer said:

*No-one in this room, of course.* (V)

The emotional elements were one of the biggest aspects of this topic of research. Even introducing the topic to some people provoked an emotional response – from relief that someone might actually want to talk about this somewhat taboo subject, to horror that I might be engaging in some form of “seniors bashing”, or fear that this topic might be a little too close to home. The early signs were warnings from people about the fact that this was a “sensitive issue”. The guarded responses from some people who enquired about my research were indicators of some of the interaction of emotions which would have a role in the data gathering process.
Part of the process of gathering data for this research was about earning the trust of the gatekeepers in the organisation, many of whom expressed relief that the issue was going to be explored, but also were extremely concerned that their volunteers be protected from any potential harm that they might unintentionally be subject to as a result of this research. In the group discussions some people were comfortable to mention that they had made adjustments to their volunteer activity, discussed above. But while some expressed concerns about their ability to remember things or to learn new technology, most mention of cognitive change tended to turn the discussion away to experiences with others outside the group holding the discussion, or to general terms about people:

I think a lot of people...a lot of older people are actually scared of doing certain things because they don't understand it. (V)

In my role as researcher I have considered whether it is possible that this statement also characterises both the fear of frailty and the fear of managing frailty which the actors experience in this context.

5.14.5 Methods and methodology

The evidence here about the methodological gains made by the choice of approach can be summarised as insights which were available from the data due to the nature of data collection. These included insights into the sensemaking processes experienced by the managers and volunteers, the development of a progression in understanding experienced by volunteers in group discussions, the sharing of a common language, and the emotional barriers experienced by managers and volunteers alike. Most importantly, however, discovery of the PEPping process was a direct result of adopting a theoretical sampling process. As has been discussed, the Voluntary Association was approached because there was some evidence in earlier group discussions and interviews about voluntary associations. The main key for this was data in the Wellbeing Organisation group discussion:

In my other volunteer position we’re all managers, I mean we’re a committee together we manage it all, but we still have to deal with people who are not doing what they’re supposed to. (V)

Thus following leads from one organisation to the next along the lines of asking those who are likely to know about the leads which have arisen yielded access to an organisation which had a system in place.
The examination of the PEPping process highlighted partnership and peer support as important categories, as well as revealing the benefits conversation and discussion about performance and ageing because these had already taken place in this organisation. PEPping opened up nodes and categories for analysis in the data already collected in the earlier organisations and provided insights into that data which would not otherwise have been achieved. Free ranging dialogue rather than structured positivist interviewing would not have yielded the data reaped in the in-depth interviewing and group interviewing approach adopted.

These methodological gains will be further discussed in the next chapter.

5.15 SUMMARY AND CONCLUSIONS

This chapter has outlined the key elements of the data as it was collected and offered a thematic analysis. It has addressed the three key research questions and an emergent question of who are older volunteers. Older volunteers have been characterised in their own words and in the words of their managers, as passionate and dedicated, skilled and experienced and as knowledgeable actors. The relationship between managers and volunteers, in particular older volunteers, has been explored and the importance of that relationship identified. Value and respect have been identified as key elements of that relationship, as has the division of labour between paid and volunteer staff.

The issue of “decline” has been identified as one which causes some stress to managers and to volunteers and as one which is not really talked about. Performance expectations, changing capabilities and the responses of volunteers and managers to different types of change were discussed, and the volunteer reactions to three different management responses identified. A peer evaluation process operating in one organisation served to highlight the value of dialogue in the management process. The importance of context, including the relationship of volunteering to paid work, was strengthened by the qualitative data collected.

This chapter has also identified methodological gains identified in the process of analysis and confirmed the value of the in-depth data collection process. The nature of “decline”, the responses of the managers and the views of the volunteers have all been examined from the point of view of the actors. The context in which volunteering takes place, particularly in reference to paid work, has been identified as
being an important factor which is part of the world constructed by the actors in the volunteering field. Sensemaking emerged from the data as an appropriate diagnostic tool which will be important to theory building in the next chapter.
CHAPTER SIX FINDINGS – SYNTHESIS AND INTERPRETATION OF RESULTS

6.1 INTRODUCTION

This chapter considers the data which has been analysed and provides an interpretation and synthesis. As has been revealed in the previous chapter there is an important relationship between the manager and the volunteer and this is disrupted by the manager perceiving changes in the capability of the volunteer and having to take action. The context in which this action must take place is important and the "undiscussability" of functional ageing, accompanied by some organisational factors, make for reactions and responses which are not always appropriate to the situation.

The chapter commences with a brief discussion of a question central to the context in which this study took place "what is ‘older’?" The next section maps the data employing sensemaking as a tool to describe what happens for managers and volunteers, and then moves on to develop theory in an attempt to explain the phenomenon under investigation.

6.2 WHAT IS “OLDER”?

It is clear that there is an understanding amongst volunteers and managers that there is a likelihood of changes in capabilities and performance which are associated with the ageing process. The evidence is that "older" as a socially constructed concept that leads people to understand that being "older" is likely to be associated with changes in capabilities.

The evidence in the literature is that there are normal functional changes associated with ageing, including changes in the speed at which people can do things, changes in memory, cognitive processing and physical capabilities including balance and stamina. There is also evidence in the literature that there are some illnesses and diseases which are more likely in older people, such as dementia and arthritis. The literature also revealed that there are assumptions and myths associated with older people which influence the way that they are treated, which are grounded in fact but which over-emphasise the prevalence and impact of functional ageing and age related illness and incapacity. The data from this study while not directly testing performance
and ageing, provides evidence which is consistent with the view that there are changes in capacity which can be associated with age, but that ageing does not necessarily mean declining capacity.

Volunteers themselves have indicated a preference not to be labelled "older" while at the same time referring to some others who have experienced changing capacity in the ageing process as "elderly" or talking in hushed tones about the ageing process.

The social construction of age is a factor which will be returned to at the end of this chapter as influencing the frame in which volunteering and volunteer management takes place.

6.3 MAPPING THE DATA

As can be seen from the data there is agreement that volunteers make an immense contribution to the organisations in which they work, and the roles they undertake are many. Their reasons for taking up volunteering and for continuing to volunteer are not static, nor are they entirely altruistic or egoistic. It is clear that they enjoy keeping active, want to make a contribution and derive a great deal of satisfaction from their work. It is also clear that managers and volunteers have a shared understanding about the important qualities brought to organisations by older volunteers, and about the satisfactions gained from volunteering. These shared understandings are part of the context (or frame) for sensemaking which takes place when there is a change or variation in the performance of a volunteer which draws attention or creates an interruption.

This section will map the data with regard to the main research question:

**Question 1:** What are the experiences of managers and older volunteers when a manager believes that an older volunteer's performance is declining due to age?

Important to this process is the context in which this takes place, including the way management is experienced by managers and volunteers. The remaining two questions are not mapped separately as the processes mapped are embedded in the context of which management style and approach is a part.

**Question 2:** What are the ways management of older volunteers is experienced by volunteers and managers in volunteer-involving organisations in Western Australia?
Question 3: What are the major contextual factors which are contributing to those experiences?

Managers of volunteers expressed concern at a situation which arises when a volunteer, who they consider to be older, no longer performs to the standard or in the manner expected or required by the organisation. In considering the data which has been gathered from the actors there are a series of events which take place which are the focus of this investigation.

Figures 6.1 and 6.2 (see also easy reference fold out in Appendix F) map out the responses to a change or variation in performance (the interruption) from the perspectives of the manager and the volunteer. There are a number of commonalities, and these will be discussed first.
Figure 6.1: Mapping of volunteer responses from the data

Figure 6.2: Mapping of manager responses from the data
6.3.1 Interruption

The flow of performance is interrupted by a performance change or variation. Such an interruption might be sudden or it may be subtle, constituting a range of cues and indications that there has been a change or variation. Sensemaking takes place continuously, but triggers or cues draw the attention of the sensemaker to particular things and heighten awareness of the flow of action and events, in this case about the performance of the individual volunteer. You may recall, for example, the manager who said:

*But you don’t really notice until they can’t do something, or you notice a change in their appearance or they get the shakes or something, or suddenly you find they are not quite as quick as they used to be...it can kind of creep up on you, you know.* (M)

As has been discussed previously, the trigger or interruption creates more intense and focussed sensemaking and is one of two types – the expected event which does not occur, or the occurrence of an unexpected event. That means something which should have happened does not, or something which should not have happened does (Weick, 1995, p. 101). It is not necessarily the case that a particular dramatic event takes place, but that the sensemaker extracts certain cues which demand closer attention, such as in the case of a nurse who notices that a patient’s condition has begun to deteriorate (Weick et al, 2005, p. 410). The sensemaking process continues in the background while the sensemaker is going about their other routines and work, but the sensemaker becomes aware of the variance from the usual or normal performance of the volunteer and then “notices and brackets” the information. Noticing the variance is based on experience and the understanding of the world which the sensemaker has acquired, and the “mental models” which have been developed over time.

Weick, Sutcliffe and Obstfeld (2005) suggest that sensemaking is about labelling, and the creation of order which arises from the act of classifying what it is that the sensemaker has noticed and bracketed. In the case of the manager or volunteer where a variance in performance has triggered sensemaking, there is the variance in behaviour itself where the volunteer’s actions or the performance outcomes are not what is expected (either in the form of unexpected performance, or in the absence of performance).
In the diagram the interruption is depicted as being either physical, cognitive or behavioural. This will be returned to later.

6.3.2 Incipient state of sensemaking

Sensemaking, as has been mentioned, occurs all the time in the background, but once an interruption is experienced what is known as an “incipient state of sensemaking” occurs (Weick et al, 2005, p. 411). The sensemaker considers “what’s going on here?”

The differences in the sensemaking process for the manager and the volunteer will be returned to shortly. Firstly, it is important to point out that sensemaking itself is continuous, and that the volunteers and managers are continuously making and remaking their understanding of the world, including their interactions with each other, and with the context in which they are operating. The depiction of two separate processes in Figures 6.1 and 6.2 is for simplification, as is the order in which the sensemaking is shown as part of a linear process. In simple terms the interruption precedes more intense or focussed sensemaking by both managers and volunteers, and the interaction between managers and volunteers adds to and becomes part of the sensemaking process. These are shown in a linear format to make explanation possible, while in reality they are part of a cyclical process as discussed earlier.

6.4 “WHAT’S GOING ON HERE?”

6.4.1 Volunteer sensemaking

It can be noted from the map relating to volunteer responses that increased sensemaking triggered by an interruption for the volunteer does not always happen. In this case the change or variation is noticed by others (see Section 6.4.2). Where more intense sensemaking is triggered the two stages of sensemaking (described by Weick et al, 2005, as “what’s going on here?” and “what action is needed?”) are influenced by a range of emotional responses, as well as the processes of seeking understanding and seeking direction. As has been discussed, the types of indicators in the data which relate to sensemaking for the volunteer include a question at the end of a description of a self-reinforcing cycle relating to being slower in using the computer: “but does this matter?” And comments such as “and I think to myself (V)”. Part of the sensemaking process for the volunteer is the issue of self-awareness and self
knowledge. As can be seen from the data there are a number of actions which result from the sensemaking process for volunteers.

6.4.2 Others notice change

As discussed above there are also times when the volunteer does not notice the interruption but others do. The evidence in the data is that there are times when the volunteer does not appear to be aware of the changes in their performance which others have noticed, but there is no way of knowing that is the case. Volunteer peers cover up for and manage the situation without necessarily telling the volunteer and managers express uncertainty. It is difficult to tell if any of these situations are ones where the volunteer has made a conscious decision to do nothing, or to ignore signs and symptoms of change, and because of the efforts of others the situation remains undiscovered.

In early coding of data a thematic group was created based on Anne Kerwin's "domain of ignorance" (Kerwin, 1993), in particular taboos— forbidden knowledge and denial— things too painful to know, but these categories were not saturated and so while they can be considered as part of the bigger picture, they are not included in the mapping of responses. Some of the types of data which were included in this category were "I don't want to know" from one volunteer and "maybe she's in denial" from another. The different perspectives on how aware the volunteer is of changes in their performance is illustrated by the three cases presented in the scaled section. The issue of awareness, however, is one which will be returned to, as the assumption that the volunteer is unaware may be contributed to by social construction of ageing.

6.4.3 Manager sensemaking

The managers, too, engage in increased sensemaking when there is an interruption to flow in performance. Sometimes this is because of the matter of interruption being brought to their attention by another, but usually because they have personally experienced the interruption as discussed above. They, too, go through the "what's going on here?" and "what action is needed?" processes, but unlike the volunteers, the managers have an organisational mandate/obligation to take action if it is necessary. Indications that managers engage in sensemaking are included in the data as ongoing even after action has been taken. The data revealed an internal dialogue, with some managers currently considering a particular case:
One in particular had a death in the family, and she seemed to go downhill quite a bit [lengthy pause] but she’s slowly coming back. (M)

As has been revealed in the previous chapter one manager actually reported the sensemaking process:

I kind of sit there and think, is it important? Should I do something about it? What if I’m wrong? Can I really handle this? (M)

The “what’s going on here?” part of the sensemaking process as it is experienced by the manager is further considered shortly.

6.5 “WHAT ACTION IS NEEDED?”

As highlighted earlier, the second part of the sensemaking process is the “what action is needed?” part. The concept of “how do I know what I think until I see what I do?” [discussed earlier as an extension of “how can I know what I think until I see what I say?” (Weick 1995, p. 12)] is the basis for this second element of sensemaking being discussed in the context of the action segment of the figures above (Figures 6.1 and 6.2).

6.5.1 Volunteer sensemaking

Volunteers may deliberately decide to do nothing, preferring instead to continue without making changes to their volunteer activity. The evidence from the data is that many volunteers undertake self management. Many of these actions include making changes to the way they carry out their work, for example, choosing where they sit in a meeting, asking for larger print on rosters or asking for less strenuous duties. Other examples of self management in the data include withdrawing from volunteering or reducing the volume of activity.

There is also evidence in the data that some volunteers wait for management of their situation, including expressions of relief when someone takes action on their behalf or wondering if others notice.

Two other “actions” occur, one being peer support or action, at times, according to the data, “covering” for the volunteer or providing support and assistance. The concept of peer support or action can also be categorised as being similar to the concept of partnership depicted in the figure of manager responses (Figure 6.2) and will be further discussed in that category.
The last type of action is depicted as "no decision". This is inaction which results not from a deliberate choice, but more as an outcome of inertia, a failure to move or gain momentum. The evidence of this last "action" in the data is limited, and could not be classified as a saturated category. Omitting it from the diagram, however, resulted in an incomplete picture of the types of action encountered.

Mapping the responses of the volunteer from the data (Figures 6.1 and 6.2) shows the management sensemaking and action as following that of the volunteer, because (especially in the event of self management) managers report that often volunteers organise or manage their own changes in capability before the manager has to engage with the situation. As can be seen from the data, the self management outcome is a common response from volunteers.

6.5.2 Manager sensemaking

As with the volunteer, the manager may take no action, either as the result of a deliberate choice to do nothing, or of a failure to move or gain momentum — "no decision". As with the volunteer, they may decide that the cause of the interruption (or the effects) are of insufficient magnitude to warrant making changes, or they may be caught in sensemaking at the "what's happening here?" stage or uncertain of what action to take. The evidence from the data is that aside from inaction, a manager's action focuses on the task or the person, or involves a dialogue or partnership between the manager and the volunteer to work out what happens next. The evidence of the distinctions between these types of actions actually came more from the responses of the volunteers than from the self reporting of the managers.

As can be seen from the data chapter, actions and styles which focus on the task are often viewed negatively by the volunteers. However, some of the people-focused actions are often viewed as being overly solicitous or patronising. Sometimes these actions are born out of the personal style of the manager, but there is also evidence that the style of action varies depending on the situation. It is also apparent that the partnership or dialogue approach is the one viewed most favourably by the volunteers. The data chapter reveals volunteers expressing their wishes to be told directly of changes to their performance.

The responses of the managers in this study are not dissimilar to those discovered in a study of managers of women volunteers which was being undertaken
in New South Wales at the same time. These three styles – task oriented, people oriented and partnership oriented – are reflective of similar styles identified by Leonard, Onyx and Hayward-Brown (2004) in a study of managers of women volunteers conducted in New South Wales and referred to in the literature review.

Leonard, Onyx and Hayward-Brown's qualitative study identified three "coordination styles – horizontal, nurturing and managerial" (2004, pp. 212-13). These three styles can be loosely compared with the three manager actions identified in the current study: task oriented, people oriented and partnership. The three styles in this research emerged in data coding and categorisation prior to encountering the New South Wales study and I was intrigued by the considerable overlap between the three.

The style termed "managerial" by Leonard et al (2004) is somewhat consistent with aspects of the "task oriented" response identified in the current study. The view that at times managers handled situations of declining performance by a volunteer in a manner which indicated that it was a nuisance or got in the way of getting things done was an aspect of this response, as was when the volunteer felt that they had not been accorded the respect to which they were entitled. In the Leonard et al study it was reported that "co-ordinators did not want volunteers 'to get the idea that they are virtually as good as or better than paid staff'". This element was not apparent in the current study (although the spectre of paid work is lurking here, too). The evidence in this study pointed to the "task oriented" approach being more about aspects of time, skills and experience, and empowerment with the managers feeling less able to cope with performance issues. Certainly, the evidence in the Leonard et al study of "managerial style" being marked by managerialist terminology was not a strong element of the "task oriented" response in the current study, with the managers talking about getting the job done and meeting standards rather than slipping into terminology associated with a particular style of management. The focus on tasks and outcomes, however, was apparent in both the current task oriented style and the managerial style identified by Leonard et al.

The "focus on the person" or "people oriented" response in the current study can be compared with the nurturer style in the New South Wales study. In contrast to the "mothering" nature of the Leonard et al (2004) study, in the current study the "mothering" aspect of the carer nurturer at times crosses over into being Patronising
and overly solicitous. This may be about aspects of time and empowerment with the managers feeling less able to cope with performance issues, but it also highlighted the emotional element of the relationship between the manager and the volunteers. When the line is crossed by managers in "mothering" those who do not want to be mothered the response from the volunteers is negative. It may also be a response to the social construction of age.

Leonard, Onyx and Hayward-Brown (2004) have adopted the term "horizontal" for the approach which might equate with the style described in the current study as a partnership approach. They describe this style as having open communication, flexibility, decision making and autonomy, self direction and mutual empowerment among volunteers. They comment on the lack of hierarchy in the relationship and on the reciprocity in the relationship. In this style the co-ordinator is seen to be "working at the grassroots level with volunteers" (p. 212). This style was most evident in the Voluntary Association in the current study where "management" of the volunteers is undertaken by an elected committee of the volunteers who are also grassroots volunteers themselves. This is the group who has adopted the PEPping process, and who have already been talking about managing performance in older volunteers.

The reactions to these management styles varies between the volunteers, and such reactions are an important part of the relationship between the volunteers and their managers.

6.6 VOLUNTEER AND PEER RESPONSES

The data reveals that the responses of volunteers and peers are varied. Pity, sympathy, concern, irritation and other emotional responses to the interruption are coupled with responses to the action of the manager, either directly as a response to being managed, or as a response to witnessing the actions which take place. As can be seen from the data, volunteers are aware that the manager has responsibilities to the organisation and that when there are changes in the capabilities of volunteers then action must be taken. Their responses to being managed, however, vary according to a number of factors, including the choice of action or management style of the manager.

As can be seen from the data, the volunteers express preference in the main to the partnership style of management. They indicate a preference for being told when
the manager believes they are not performing well, and for being included in decision making. In the PEPping organisation this has manifested itself in a peer review format. If this is the preference of the volunteers, why then do managers adopt other styles? One factor is likely to be the personality of the manager, an aspect which was not explored in this study. Another aspect, however, may be the sense the manager makes of “what's going on here?”, the frame in which they do that, and the resources they have to draw on in deciding “what action is needed?”.

6.7 THEORIZING ABOUT MANAGER SENSEMAKING

As has been discussed above, the managers in this study did not always adopt one style or approach when responding to “decline” in volunteer performance which had caused an interruption which triggered increased sensemaking. Their responses to the particular management situation of changing capabilities in an individual volunteer seem to vary depending on a number of factors, including the nature of the changes in the capabilities of the individuals, and the capacity the manager has or thinks he/she has to manage the situation, including support training and options. In the New South Wales study, too, the managers “did not use purely one approach but varied their style across the topics of the interview. Mixtures of the nurturing and horizontal styles were common, mixtures of the managerial and nurturing styles also occurred, and a few co-ordinators used all three.” (p. 214). Changing styles and adapting management responses to the situation is a key element of effective management. However, where such changes are not about the subordinate or the goal, but about the manager’s ability to manage the situation, and where the changes reflect an increasingly ineffective approach inversely related to the complexity of the situation, it is a matter for concern and further discussion.

6.7.1 The complexity of sensemaking

Sensemaking takes place in a frame. The environment in which the managers and volunteers are operating is not a vacuum, and they continuously make and remake their world based on the cues and signals they receive all the time from within themselves, from their interactions with others and from the context in which they are experiencing their lives. The elements of the frame are also constantly changing, as is the sensemaker's interpretation of these. Thus an experience or event, or learning
about an experience or event of another manager or volunteer is added to the frame, either to confirm the sensemaker's understanding or to cause them to re-evaluate or reframe their understanding. In the current study the sensemaking which takes place for the manager is further discussed in terms of the frame in which it is operating, and takes into consideration the social construction of age, the knowledge, skills and experience of the manager, the status of volunteering both in society and in the organisation, as well as the types of support available to the manager.

Figure 6.3A depicts the complexity of the manager's sensemaking which is more simply represented in Figure 6.3B (included on a fold out in Appendix F). The discussion which follows relies on the linear depiction of the sensemaking process, but the complex depiction is offered to illustrate that sensemaking is iterative, continuous and intricate. Even this depiction fails to capture the density of the process.
Figure 6.3A: Theorising about manager sensemaking – Complex depiction

Manager considers cause of Interruption Volunteer "decline"?

Increasing anxiety

Increasingly difficult to discuss with volunteer

Increasingly difficult to categorise/ determine cause/ observe or pinpoint

Emotions

Manager draws on:

Experience

Knowledge

Skills

Organisational Support

Peer support and assistance

Societal status of volunteering

Emotional response:

Increasingly difficult to pinpoint cause:

Increasingly difficult to discuss with volunteer:

Increasing anxiety

Societal status of service

¿What is going on here?

Manager considers causes of change

Manager decides on action/inaction:

- decide to do nothing
- focus on task
- focus on person
- dialogue and partnership
- no decision

Volunteer decision - experience + knowledge + skills + organizational support + peer support and assistance

Figure 6.3B: Theorising about manager sensemaking – Linear depiction
The figures depict a theory of the sensemaking process which occurs for the manager, and which forms the basis of the contribution of this research. As has already been discussed, much of the theory generation was borne out of the evidence of the activity of PEPping taking place in Organisation 5 – the Voluntary Association where some of the contextual constraints placed on managers in the other organisations are removed, thus enabling a comparison which aids in theory generation. Other elements of this process arise out of the methodological gains described in the previous chapter, the “insider” knowledge of the researcher, as discussed in “Megan’s Story” and the data gathered in the context examination phase described in Chapter Four. This is consistent with the abductive processes described in Chapter Three:

Everyday concepts and meanings provide the basis for social action/interaction about which social actors can give accounts from which social scientific descriptions can be made from which social theories can be generated or understood in terms of social theories or perspectives (Blaikie, 1993, p. 177).

As the latter part of this explanation states, understanding the processes involved in the interaction which is being interpreted also draws on previous research and theory and involves making connections between work which has already been undertaken by others.

6.7.2 Making sense

Sensemaking includes two phases: “what’s going on here?” and “what do I need to do?” which do not occur in a linear fashion, but are part of a process whereby the sensemaker assembles the data they have noticed and bracketed about the accumulated clues which have caused the interruption. Sensemakers draw on their own responses to the situation, including their experience, knowledge and skills and the organisational support which is available to them in their construction of an understanding of the situation they are considering. Construction of a plausible explanation, and then determination of action which should flow is part of the process of enacting a sensible environment in which action can take place in the future. In the current study, when an interruption occurs to the flow and an “older volunteer” is thought to be no longer performing to the standard required by the organisation, the manager has responsibility for taking action on behalf of the organisation.
As has been discussed above, the sensemaking process is not linear. It occurs in a context which includes the society in which the organisation is operating, and the demands and supports in the organisation itself. The manager, while sensemaking, draws on his/her own experiences, knowledge and skills in the determination of both “what's going on here?” and “what action is needed?” The processing which takes place applies labels, groups and sorts, and uses words and sentences to construct meaning and understanding of discrete sections to make order and “sense” out of events or occurrences. “...sensemaking edits continuity into discrete categories, observations into interpretations, experiences into bounded events, and perceptions into pre-existing plans and frameworks.” (Weick, 1995 p. 108).

6.7.3 “What's going on here?”

The first element in the sensemaking process as it has been triggered by the interruption is consideration of the nature of the change, and possible causes. This is the “what's going on here?” phase of the sensemaking as described above. As has been shown in the data, there are different sorts of variations which occur, and these generally fall into three categories – physical, cognitive and behavioural. These categories are not discrete and can occur together or at least be noticed as part of a composite change in performance.

**Physical changes in capacity**

Managers bracket the changes. Changes in physical capacity tend to be relatively easy to pinpoint, relatively easy to discuss with the volunteer, and while they involve a certain amount of stress, tend to be more easily managed. Managers may feel sadness for the volunteer that they are no longer capable of particular tasks, disappointment that they no longer can allocate particular tasks to the volunteer, and regret at having to be the person to “break the news” to the volunteer. Generally, the move from “what's going on here?” to “what do I need to do?” involves an approach of partnership where the manager starts with “well, first you have to talk to them”.

**Changes in cognitive capacity – the problem of awareness**

Changes in cognitive capacity tend to be more difficult. As the data has shown the individual may or may not be aware of the changes which others have noticed. In early data analysis, categories of “aware” and “unaware” were created, with a third
category of "denial" bridging the two. However, these categories became difficult to maintain and were discarded. This was because it was apparent from the data that such awareness was hard to gauge. When the manager thought the volunteer was unaware of the changes taking place, volunteer responses indicated that at times they were aware of some changes taking place but waited for someone to notice or take action.

Denial/awareness was a researcher imposed category which failed to reach saturation but for which there was a small amount of evidence. These nodes are important to the discussion of cognitive changes, in part because of the lack of saturation of categories. The tendency which emerged was that the volunteers themselves tended to talk more about others than about themselves when describing changes which may be classed as cognitive. The few who referred to changes in their own memory or cognitive processing speed were not referring to some of the complex and subtle changes which managers and peers discussed. It is not clear whether this was because of a lack of "awareness" or some other factor.

In the "scaled section", individual cases (particularly those where both views are presented) the insider views of the individuals differed from the organisational and peer views of events enough to illustrate why the "well, first you have to talk to them" stage may be difficult. Managers, therefore, have the increased stress brought on not only by their own emotional response, but also by the difficulties associated with pinpointing specifics in the individual's performance about which to talk, and the increased difficulty associated with talking about things which had been noticed and bracketed but which were perhaps not yet specific enough to pinpoint. By the time cognitive changes such as memory loss or inability to process and categorise data have reached the point of being clearly identifiable and specific enough to talk about it may be that the individual's capacity to understand the discussion, to remember it, or to accept that such changes have taken place may be diminished or intermittent. The examples of the bus driver, and the person classifying data from the earlier study (Paull, 2000) are examples where the cognitive changes which have taken place have reached that point. Thus, the type of variation or change in the capability of the volunteer due to functional ageing brings with it increasing difficulty in pinpointing "what's going on here", increasing difficulty in talking about it, and increasing levels
of anxiety for the manager. The subject of increasing difficulty in talking about variation or "decline" will be returned to shortly.

**Volunteers behaving badly**

A group of set of changes discussed separately in the previous chapter are the behavioural changes reported by managers and peers. As has been noted, these examples which have been cited as examples of performance "decline" in "older" volunteers are all examples that when encountered by themselves in volunteers who may not be considered "older" would be seen as poor performance requiring management. In circumstances where a manager encounters behaviours such as breaching confidentiality, intransigence in the face of change or gossiping in another volunteer, earlier research indicated that an organisational climate or culture of nurturing which valued the volunteers feedback delivered in a timely manner was often sufficient to improve the behaviour (Paull, 2000). So what makes it different in an "older" volunteer?

A number of propositions arise in the analysis of this question. Firstly, some of the "symptoms" or cues noted as behavioural changes could be a sign of cognitive changes, including early symptoms of dementia. Secondly, if the person is chronologically "older", it is plausible that there is a connection here, that is, the knowledge and experience could lead to a quite plausible (to the manager) conclusion that this is the case. Two more factors enter into this equation. The first is the social taboos which seems to be associated with discussing or addressing ageing and dementia and the second is the contribution of the "social construction" of age which brings with it all sorts of assumptions.

Early signs of cognitive decline can include behaviours which are out of character, or decreased ability to comprehend or remember changes or instructions (Access Economics, 2003; Pieters-Hawke & Flynn, 2004). Sometimes individuals compensate for the changes in their behaviour, or become defensive or aggressive when approached or confronted. Data was not collected about these behaviours in such a way as to determine exactly which behaviours are a product of functional ageing, and which are the result of other causes. The fact that such behaviour can be an indication of declining functionality due to ageing is something about which the managers are often aware, and some have experienced (and thus is part of their frame or social understanding of their environment). The literature indicates that there is

**Dangerous assumptions**

The assumption by the manager that the behaviours are a product of age is partly due to the fact that in the noticing and bracketing of the behaviours the manager also “notices” that the individual is “older” and factors this into their construction of understanding – it is plausible that the behaviour is a product of ageing. As was discussed in the literature review, the concept of “older” is part of a socially constructed understanding of ageing. In a sensemaking view of the process the interruption or changes in behaviour are noticed and bracketed. The frame has two elements: the behaviour of the individual until that point (where the manager has developed a certain expectation of a standard of performance) and an understanding that where “older” volunteers are involved there is a likelihood of changes in performance due to ageing. In this situation the cue is the change in behaviour, and the connection is the manager finding it plausible that the change in behaviour is a product of ageing. In the data it was evident at times that volunteers were sometimes not categorised as “older” by managers until such time as a performance variation became apparent. The reverse was also true, and when asked to identify who are “older volunteers” functionality was one of the areas of description. This was evident in the data.

6.8 *WHAT DO I DO? – WHAT ACTION IS NEEDED?*

Further to the elements of the frame, namely the expected performance and the construction of ageing, the manager draws on their experience, knowledge, and skills in moving from the “what’s going on here?” to the “what action is needed?” component of sensemaking. Important to this discussion is the evidence in the data from the managers themselves about their concerns about how to manage “declining” performance.

6.8.1 Managers feel ill-equipped/trained

Managers reported feeling being ill-equipped to manage such situations, both in terms of their skills and their emotional responses. Some managers expressed
concern at their lack of experience or training, and others indicated that they lacked the time to put a lot into managing one particular person or situation. These two elements are products of the context in which the manager is operating.

**Context: Organisational status of volunteering**

The status afforded volunteering in organisations is reflected in the resources which are put into volunteer programmes. The amount of support received by the manager in terms of training and development, time allocation and other resources are part of this picture. Managers of volunteers are often time poor and trying to cope with many pressures including administrative requirements and demands from other parts of the organisation. As has been shown in the contextual data, the manager of volunteers is often responsible for a range of duties beyond management of volunteers, or occupies a part time position. In some cases the management role falls to another volunteer, or is considered to be a minor part of the paid worker’s role in the organisation. In addition to the data provided in the quantitative data collection phase of this study, there is evidence elsewhere of the burden of responsibility placed on managers of volunteers (e.g. Paull, 2002; Vanstein, 1999). The pressures of time and responsibility placed on the manager are part of the evidence in the data in the current study. This is consistent with the evidence in the literature review. For example, Hedley (1992) argued that the management of volunteers is often more complex than managing paid employees. One of the factors highlighted in the literature review is the expectation of the volunteers for sound management and recognition of the special status of volunteers. Managers as well as volunteers have observed the pressures on managers in the current study.

The fact that a manager of the same number of paid FTEs would not have the same number of people to manage does not seem to be taken into consideration by the organisation on many occasions. The status of the manager or co-ordinator of volunteers is evident in the allocation of volunteer management as an additional duty for workers in other positions, and in the part time employment status of many managers of volunteers outlined in Chapter Four. This may be due to the paradoxical status of volunteering vis-à-vis paid work.
Volunteering vis-à-vis paid work

As has been illustrated in the data, volunteers are highly regarded on the one hand for their contribution to society but volunteering appears to enjoy lower status as an activity when compared to paid work. This status has been the subject of concern and debate among researchers and practitioners in the volunteering field for some time. The "spectre" of paid work witnessed in the data may contribute to the organisational status afforded volunteering. The neo-disciplinary or pre-paradigmatic state of volunteering may also have contributed to this position. In the literature review it was reported that the tensions and contradictions in the field have contributed to a lack of coherence in the measurement and, therefore, quantification of volunteering. The inability to accurately estimate the numbers of volunteers, and the consequent limitations on accurately calculating the value of volunteering in monetary terms has contributed to the delay in volunteering being recognised for its importance to the economy and to a society which often fails to recognise those things which are not quantified. Recent changes, including attempts to promote the value of volunteering in social capital terms, are beginning to improve this situation. Many organisations, however, have yet to translate their acknowledgement of the importance of volunteers to their work into better recognition of the importance of the paid staff who manage the volunteers, both in terms of pay and conditions and in terms of the training and support offered them. Volunteers indicated their awareness of the workloads and pressures faced by managers of volunteers, and these have been discussed elsewhere (Paull, 2002), including in the literature review. It is not the individual organisations, but rather the societal view of volunteering which contributes to this situation by the apparent contraction whereby volunteering is on the one hand valued as an altruistic act and one which contributes to the society in immeasurable ways, and on the other hand poorly resourced and supported at the organisational as well as the societal level. The expression "volunteers work for free but good volunteer management is not without cost" is an important concept recently explored by the task force which reported to the federal government on the rising costs of volunteering (Costs of Volunteering Taskforce, 2006).
6.9 ACTION

As has been established from the data the classification of the individual as “older” combines with the taboos of not talking about ageing openly, the emotional responses of the managers and their self-efficacy with regard to management skills to lead to two types of management response which are not well received by the volunteers. One response is a task oriented approach where the individual senses the impatience of the manager and the other is a people focussed approach which, as the data shows, can lead to the volunteer feeling patronised. In addition to these two responses are the responses of “inaction”, “choice of no action” and a third response characterised as “partnership”.

Incidents of “no action” aside, the three managers’ responses identified in this study (characterised as “task oriented”, “people oriented” and “partnership”) arose after sensemaking had commenced, and (with some of the managers) after a period of inaction or indecision.

As canvassed in the literature review, one of the questions which is often debated with regard to the management of volunteers is whether volunteers should be managed in the same way and using the same tools as are used to manage paid employees. Such a discussion assumes that there are tools within the realm of the management of paid workers which are appropriate to the management of the volunteers in question. It also assumes that organisations have the capacity to manage volunteers as if they were paid workers, and that they choose not to, or don’t know how to.

As was discussed in the literature review, managing volunteers is said to be more difficult than managing paid staff (Hedley, 1992). This is so because of a complex set of relationships within organisations that makes the volunteer a service delivery agent, a client and a giver. This results in a “special” status for volunteers which is complicated by the expectations of volunteers that their work will be well structured, well organised and appreciated (Farmer & Fedor, 1999). Further, it was argued in the literature review, that there are unique elements to volunteering which make managing volunteers as if they were employees both impractical and unwise (Paul, 2000). Despite this it was also argued that to ignore that which is known about the management of paid employees, however, ignores that there are many elements to
the management of people which do not rely on the existence of a formal contract or a pay cheque.

Turning to the first assumption, the question as to whether there are tools within the realm of management which are appropriate to the management of the volunteer who is experiencing changes in capacity due to the ageing process should be considered. Given that the PEPping group has developed a process which, while not removing the problems altogether, is based on tools developed for managing paid workers and adapted to the circumstances of the volunteer-involving organisation and its volunteers, it is demonstrably the case that there are tools which are appropriate at least for adaptation to the volunteer context. As was stated at the outset, this study was not intended to focus on "performance management" systems as they are known to HR practitioners but on the day-to-day management of volunteers by line managers. That being said, the discovery of a performance management system in the Voluntary Association – Organisation 5, lead to insights into the phenomenon under investigation which may not have otherwise been achieved.

PEPping involves elements which have been highlighted by this study as being important to the volunteers and to the managers. These can be summarised as:

- a recruitment, selection and training process which sets up expectations and requirements for the volunteers;
- a framework for evaluating the performance of volunteers and for them to know at the outset what is expected of them;
- a mechanism by which the volunteer is evaluated by a peer or equal, and provided with the opportunity to receive feedback on his/her performance; and
- a support system for the person or persons who find that the volunteer they are evaluating is perhaps not performing to the required standard.

There are some process gains which have not been explicitly stated by the volunteers or the managers but which became evident in the study. Most important of these is that the volunteers who are involved in PEPping are discussing performance and those who are involved on the committee are sharing their experiences and ideas of performance decline associated with age in a way which educates them and informs them about this phenomenon. The organisations where such discussions were a novelty and where a progression in understanding was observed amongst those volunteers who participated in the group discussion provide evidence that greater understanding will come from discussion.
6.9.1 Options for action

Managers and volunteers have a number of options available to them and these have been described by volunteers and managers who participated in this study. Volunteers self manage. They indicate to their manager that they can longer climb on rooftops, or walk long distances, they sit closer to the chair in meetings so that they can hear or they withdraw from some activities altogether. This is consistent with the data which shows a tailing off in the volunteer rate amongst those 75 years and older reported in the ABS statistics (ABS, 2001).

Managers find alternative activities for their volunteers or help them to make the transition from volunteer to client where this is available as an option. The obstacles for managers seem to be these:

- low self efficacy about discussing the possibility of declining performance with the volunteer;
- limited time availability when it comes to addressing issues which take time away from day-to-day, already time pressured activities; and
- limited skills and training in management of functional ageing.

The findings to this point open up more questions in the development of theory about the questions being researched. What is the context in which the management of volunteers is taking place? Why is it that the managers of volunteers are time pressured, feel uncertain about their abilities to manage such situations, and resort to approaches which are considered to be ineffective and disrespectful by the volunteers? Volunteers in this study have expressed concern that some of the managers appointed to manage them are unprepared or even unwilling to do so. Managers who are appointed to the positions are often part time or have other roles to play in the organisation, and some of the managers in this study indicated anxiety at not having the training to manage more complex situations, and in some cases not having the authority either.

A time pressured manager who has competing priorities, and whose experience indicates that behavioural changes may be caused by functional decline associated with ageing, is likely to notice and bracket behavioural changes and decide what action is needed based on his or her experience. The example of the organisation which has set up PEPping provides some further evidence to support some of the propositions above. In this organisation everyone is a volunteer. The development and introduction of the PEPping system has been undertaken by
volunteers who have the freedom to choose their priorities, and to decide how much or how little time to spend on management activities. Further, the issue of changes in performance is one which has been the focus of considerable discussion and debate associated with the development of this system. Both the task group charged with responsibility for development and oversight for the system and the wider organisational community have contributed to the discussion. In addition, because everyone is a volunteer and the organisation is held in high regard by its host organisation, the volunteers occupy a clear position of status in the organisation. Further, because the process has been systematically developed, there is a set of clear choices of action for those who have the responsibility for managing the situation, and a clear support system for the manager and the volunteer in terms of evaluating “what’s going on here” and “what action is needed?” Finally, because there is a clear pattern of setting expectations, including training on what performance is expected, and briefing on what sort of evaluation will take place, volunteers are aware of the process and self-monitor on that basis.

Given that the PEPping system is a working example of the way in which a management tool developed for the paid workforce has been successfully adapted for volunteers, it is apparent that such adaptation is possible. That aside, there are elements to the PEPping system which can be highlighted as important without the framework of a formal performance management system. These can be identified as:

- setting clear expectations for volunteer performance;
- open and clear feedback mechanisms to make sure volunteers are informed about their performance; and
- clear options for volunteers and managers when performance “decline” is suspected or noticed.

The methodological gain identified where the volunteers began to inform themselves about cognitive decline (by participating in the discussions about ageing “for the first time” in the other organisations) have already taken place in the PEPping organisation. Conversely, however, there is also evidence that there are some assumptions which are part of the social construction of age which are likely to be perpetuated and repeated if such discussions do not canvass the possibility that age may not be the cause of a change in performance by an individual.

The capabilities framework (Gagnon & Cornelius, 2000), discussed in the literature review, provides an option for managers which would involve development
of an approach which addresses the capabilities of the individual whose performance is seen to be declining. The opening phase of this is discussion with the volunteer, a skill which managers will need “permission”, time and skills to undertake. Permission would come from a social understanding among volunteers and managers which would make functional ageing less of an “undiscussable”. This involves a change of awareness of the importance of not offending people by addressing functional ageing – an issue of social construction within the organisation.

Once an issue is being discussed the identification of changes which are associated with ageing, such as physical changes which alter an individual’s capabilities, can be addressed by making changes to the work to suit the individual’s capabilities. Changes which are not associated with ageing, for example, behavioural issues which are about the volunteer not complying with organisational rules or not adopting processes and procedures as required by the organisations, can be addressed because they can be talked about.

Changes which are associated with cognitive changes can also be addressed by the capabilities framework. This approach would involve direct conversations with the volunteer, alerting him/her to the changes which are happening and allowing him/her to take the actions he/she may need to take to delay or frustrate the onset of the changes. Research into these changes indicates that the earlier the person is aware of these changes the more action he/she can take to address them (Access Economics, 200?; Alzheimer’s Association, n.d.; Pieters-I lawke & Flynn, 2004). A partnership approach between manager and volunteers which allocates work to them according to what they can do, their capabilities, is in keeping with the approach adopted for physical changes, and with the partnership approach favoured by the volunteers who participated in this study.

6.10 WHERE IS THIS LEADING?

In the sensemaking process, the manager notices or brackets the event or cues which are classified as the interruption, considers “what’s going on here?”, and makes a judgement as to what is happening. This plausible explanation - which includes that the volunteer is “older” and that changes in performance may be associated with age - then has to determine “what action is needed?” based on this judgement.
Many volunteers give many hours of service to more than one volunteer-involving organisation, and often in more than one role. As discussed above, the managers highly value the work that the volunteers are doing, and the importance of that value being recognised cannot be underestimated. Such recognition, however, can actually add to the weight of the dilemma faced by the manager, the organisation and other volunteers when a valued colleague begins to be seen to be unable to perform to the standard required by the organisation.

Essentially the dilemma (that is, the choice between equally undesirable alternatives) is this:

Choose between:

Telling the older volunteer – often long serving, highly respected and well loved – that their performance is no longer to the standard required by the organisation

Or

Continue to involve the volunteer, setting in place mechanisms to manage the risks associated with declining performance, which can be a time consuming and somewhat unsatisfactory process for both parties involving either a change in duties, a change in jobs, or assignment of another person to assist the volunteer.

To the outsider this dilemma can seem straightforward: ask them to change or ask them to leave. The choices, however, are not as simple as they seem. The volunteer may be unaware or not willing or able to acknowledge the decline which the manager has perceived. They may be reliant on their volunteer involvement for their social support and for meaning in their life, and have a strong commitment to the organisation, the tasks and/or the people in the organisation.

Most of the time, if the “what’s going on here?” sensemaking determines that there is physical decline, the manager approaches the volunteer, talks about what action to take, and makes a partnership agreement for action. If, however, the judgement made by the manager is that the “decline” is cognitive, it is more difficult for them. The factors which contribute to this difficulty can be summarised as:

- Managers find it more difficult to be confident about what they have witnessed/concluded.
- It is more difficult for them to talk about it with the volunteer, in part due to classifying the decline as associated with “ageing”, in part due to some of the taboos associated with talking about functional ageing, in part due to them not feeling equipped to broach the subject or make a “diagnosis”, in part due to being uninformed about the benefits of addressing such decline early.
• There is an increased level of anxiety associated with managing this situation.
   
   What tends to happen is that the manager either focuses on the task and the
   goals in order to navigate a way out of the situation, and becomes impatient or less
   sensitive to the needs of the volunteer, or the manager focuses on the person in an
   attempt to be nurturing or caring, but at times reverting to a manner or style which
   disempowers the volunteer by making decisions on their behalf or patronising them.
   Sometimes these two responses both happen.

   An extreme example of this was reported recently in newspapers worldwide
   where nearly 30 volunteers over the age of 70 at the Reagan Presidential Library in
   Los Angeles were notified in writing that they had been awarded "emeritus" status
   and were no longer required to conduct tours of the library. The library's emeritus
   programme developer responded to media examination of the issue by indicating that
   "age was not a factor" in their decision to remove the duties associated with
   conducting tours from the volunteers "due to the physical and intellectual rigours of
   the job after the campus expanded" (Reagan library volunteers claim age bias, 2005,
   p. 32). The volunteers who were being retired were given glass globes and certificates
   signed by the former President's wife, but their response was not one of gratitude. The
   volunteers were reported to be "heartbroken" and their reaction was summed up by
   one who said:

   I guess they thought we wouldn't be able to bounce around and were
   looking for younger people. But believe it or not, you can walk and talk
   in your 70s (Reagan library volunteers, 2005, p. 32)

   Such a response is not unlike some of the reactions of volunteers who reported
   resenting being called "blossom" and "dear" in the survey, or those in group
   interviews who did not want assumptions to be made about what they could and could
   not do.

   A third option now becomes available if the capabilities approach is adopted.
   Talk to the volunteer and agree on a course of action which may involve setting
   agreed performance expectations, changing their duties to suit their capabilities or
   having them withdraw from volunteering. This option is a combination of the options
   already available but includes the volunteer in the decision making process and, as the
   evidence from the volunteers suggests, is the one desired by the volunteers
   themselves.
6.11 SUMMARY AND CONCLUSIONS

This chapter has presented the data gathered from the in-depth interviews and from the survey data which reinforced the themes and issues, and offered an analysis of the data and emergent theory which has been developed using sensemaking as a diagnostic tool. Sensemaking emerged from the data itself as an important part of the process employed by managers when they consider that a volunteer’s performance is declining. As theorised in this chapter, when the sensemaking is taking place, if the manager considers the volunteer to be an older volunteer they draw on their understanding and experience of functional ageing to determine the action which they should take. In the event that they are time pressured, have limited training in managing the ageing process and do not have the systems and resources in place, managers at times resort to either task oriented or people oriented styles of management behaviour, which may not be the best outcome for the volunteer or the organisation. This is particularly evident where the manager’s concern is that the changed behaviour of the volunteer is cognitively based.

The data has presented some strategies and concepts which have implications for managers, volunteers and organisations, and which can be developed to inform practice. Some of these come from insights gained from the methodology employed, and others from an examination of practice in organisations, particularly one organisation which has some structural differences that have facilitated development of a peer evaluation programme. These will be considered in the next chapter.
Chapter One
Introduction
Managing older volunteers:
A subject for study

Chapter Two
Literature Review -
Older volunteers and volunteering

Chapter Three
Methodology
Research questions and approach

Chapter Four
Results Phase One
Establishing context

Chapter Five
Results Phase Two
Voices and viewpoints

Chapter Six
Findings
Synthesis and interpretation of results

Chapter Seven
Conclusion
Implications and the future
CHAPTER SEVEN CONCLUSION: IMPLICATIONS AND THE FUTURE

7.1 INTRODUCTION

The impetus for this study was an expressed concern of the managers of volunteers about the management of "older volunteers" particularly when there were changes in capabilities which the managers were attributing to the ageing process. Conducted within an interpretivist framework this study employed two phases comprising of context-setting descriptive quantitative and qualitative surveys followed by an in-depth qualitative interviews and a grounded theory approach. The suitability of the in-depth qualitative methodology became apparent as the central locus was reinforced by the data which revealed the importance of context from the actors' point of view, and by the methodological gains yielded from individual and group interviews. This chapter discusses the findings outlined in Chapter Six and the implications of these for research, policy and practice. It then goes on to discuss the importance of these findings for the paid workforce, and outlines the potential for further exploration of the topic of managing ageing workers.

7.2 THE FINDINGS RELATING TO THE RESEARCH QUESTIONS

Exploration of this topic commenced with several basic questions:

Who are "older volunteers"? What makes managers categorise them as different to other volunteers? What is happening when managers perceive that their performance is declining? What sort of actions do managers and volunteers take? How do volunteers respond to these actions? What elements of the context of volunteering are contributing to the picture?

These questions evolved over the course of the study. The core research questions which were explored were:

Question 1: What are the ways management of older volunteers is experienced by volunteers and managers in volunteer-involving organisations in Western Australia?

Question 2: What are the experiences of managers and older volunteers when a manager perceives that an older volunteer's performance is declining due to age?

Question 3: What are the major contextual factors which are contributing to those experiences?
A subsidiary and eventually crucial question was the emergent question: **Emergent question: "what is meant by older volunteers?"** This became a preliminary question for both of the research questions about management of performance, and then an important factor in understanding the context in which the other questions arose.

### 7.2.1 Experiences of management of older volunteers

It is clear from the data that managers value the work of older volunteers. Older volunteers are experienced, patient, have time and ability and offer organisations a resource not available from any other source. It is also clear that volunteers enjoy their volunteer work and gain a great deal of satisfaction from their contributions. They seek rewarding work which meets goals including making a contribution, keeping active, putting something back, enjoying the company of others and gaining satisfaction for themselves. These motivations are consistent with the motivations of older volunteers in many settings.

Managers of older volunteers report some uncertainties and difficulties associated with involving older volunteers, but many of these are uncommon or relatively routine to manage. They do, however, express concerns about managing changing capabilities in older volunteers.

Older volunteers themselves would prefer not to be labelled as "older" and do not always believe they are managed the way they would like to be. Generally, though, they are well aware of the workloads of their managers and of the challenges of managing.

### 7.2.2 "Performance decline"

This study confirms that chronological age is less than useful as an indicator of frailty, dependency and decline. Managers and volunteers are aware of the changes in capabilities which occur with natural ageing. They are aware that changing physical capabilities will mean that volunteers cannot walk as far as they used to, lift heavy loads, or climb on rooftops. They are also aware that rosters may need to be printed in larger fonts or that a volunteer whose hearing is declining may need to sit closer to the front of the room.

Managers and volunteers are also aware that ageing processes can mean that cognitive capabilities can change as well. What is less clear is how to distinguish
between cognitive changes associated with normal ageing and those associated with illness such as dementia. What happens as a result of this is that sometimes poor performance which is not associated with ageing, is classified as being a product of ageing, and left unmanaged due to uncertainty.

Volunteers often self manage when they become aware of performance decline. For example, they withdraw from volunteering, seek assistance with print size, ask for reallocation of activities or take on less work.

When the management action originates from the manager three types of action are evident - a task oriented approach, such as withdrawing task or reorganising duties, which can leave the volunteer feeling undervalued and ignored, a person oriented approach such as talking to the volunteer, which can leave them feeling patronised and belittled, and a partnership where the manager and volunteer engage in a dialogue and joint action, such as that encouraged by PEPping.

Factors which contribute to the manager's action include the knowledge, skills, experience and organisational support available to the manager. Most managers also report experiencing an emotional reaction to the realisation that the volunteer may be declining in functionality. There was evidence in this study that some managers operate with little support or training.

The evidence of a programme, PEPping, in one of the case study organisations indicates that increased communication and a mechanism for talking to volunteers about their performance can provide a framework for managing performance variations.

7.2.3 Context

Managers and volunteers operate in an environment which sends contradictory messages about the value of volunteering. While volunteers are valued for the work that they do, the actions of organisations and the community tend not to reflect the value of their contribution. In organisations, managers of volunteers tend to be relatively low paid, with limited training and limited support. In many cases they are not full time, or their role encompasses other roles in the organisation.

Similarly, the social construction of ageing means that while there is no intent or prejudice (in fact, quite the opposite) some of the actions and assumptions of managers lead to outcomes where the classification of a volunteer as "older" leads to
poor performance being inappropriately managed. In addition, cognitive ageing and dementia emerged as sensitive areas where lack of knowledge and understanding, taboos and denials, and anxiety contribute to inadequate communication. The propensity to classify behavioural changes in performance as being symptomatic of ageing, when in fact they may not be, is part of this process. The interpretivist approach has highlighted this possibility due to the recognition of the actors as being skilled and experienced.

The “undiscussability” of cognitive decline leads to the classification of behavioural changes as signs of cognitive decline leading to alternative management approaches. This leads to alternative approaches based on assumptions, rather than approaches which involve managing them the same way as similar events would be managed with other volunteers. These two factors, social construction and undiscussability, combine to allow behavioural changes which are cognitive decline symptoms to continue until they are undeniable, and behavioural changes which are not associated with cognitive decline to go unaddressed.

7.3 METHODOLOGY

The employment of an in-depth approach with the main focus on grounded theory development within an interpretive framework was confirmed as appropriate by the emergence of a series of methodological gains. These included the emergence of:
• a process of sensemaking which upon further investigation emerged as an appropriate tool for exploration;
• a progression in understanding which occurred during the group interviews;
• the somewhat “undiscussable” nature of ageing, particularly cognitive ageing; and
• the emotional barriers associated with discussing ageing.
All of these may not have emerged if another research approach had been adopted.

The emergence of sensemaking revealed the tensions and conflicts experienced by managers when they notice and bracket an interruption in the form of a variation in performance of an “older” volunteer. When the interruption is noticed increased sensemaking is triggered, and the manager seeks to understand “what’s going on here?” categorising and evaluating the nature of the performance variation in the “older” volunteer. What the manager evaluates to be the cause of the performance
"decline" leads to decisions about the "what action is needed?" component of
sensenaking. Where the manager concludes that the decline is associated with ageing
and cognitive decline there is increased difficulty in pinpointing the cause, increased
difficulty in talking to the volunteer and increased anxiety for the manager.

It was also this methodology that revealed the PEPping process being
undertaken in the Voluntary Association, and allowed exploration of the performance
management process from another perspective.

7.4 IMPLICATIONS

The evidence from this study is that better communication, better training and
better support for managers will increase the ability of the manager to manage the
effects of ageing in the performance of their volunteers. Tools borrowed from the paid
workforce and appropriately modified to suit the volunteer environment have been
shown to be effective in the management of performance of older volunteers.
Mechanisms to set performance standards which are clearly communicated help
volunteers and managers to identify performance changes, and to address these
accordingly.

In addition there is evidence that the managers do not feel adequately
supported or trained to deal with performance changes in older volunteers. Given that
there is limited understanding in the community about dementia and cognitive
changes associated with ageing, the limited understanding of the managers and of the
volunteers about these is likely to be a contributing factor in this environment. The
contextual contribution of the social construction of ageing and the "undiscussability"
of ageing outcomes, in particular dementia, also add to the picture. The evidence in
the literature is that early recognition of cognitive decline is of benefit to the
individual because the earlier they are aware of it, the more they can do to slow the
decline. Thus removing the taboo, the "undiscussability", of dementia, cognitive
decline and other changes will be of benefit to the volunteer as well as to the manager,
and to the management of the performance changes which have taken place. This
study has also revealed that older people would prefer to be told when others think
their performance is declining. The opportunity to address the situation themselves is
one they feel offers them dignity and respect, and is in line with the capabilities
approach which advocates engaging the individual according to their capabilities, in
this case in relation to their volunteer work. It is, therefore, logical that the provision of training and the opening up of communication about these issues will empower managers to better manage the impact of functional ageing in their volunteers in partnership with the volunteers themselves.

It is also evident that the efforts of volunteers and volunteering bodies to gain greater recognition for their work are not yet complete. The status of volunteering in the community and in organisations means that while volunteers are seen to be altruistic and to provide a valuable contribution to organisations and to the community, their work is not yet adequately resourced to be carried out in the most effective manner. The lack of recognition leads to a lower status for volunteers and for volunteering, which in turn leads to a lower status for volunteering vis-à-vis paid work. This lower status in turn leads to a cycle of inadequate recognition, resourcing and training for volunteers in organisations. In the all-volunteer organisation where management is not a "cost" per se, the development of a tool to manage the performance of volunteers occurred without additional resources to produce results which are effective in this context.

7.4.1 Implications for management of older paid workers

Managers of volunteers have been managing older volunteers for some considerable time. Managers of paid workers are only just beginning to feel the effects of the ageing workforce. Given that compulsory retirement at 65 was abolished in 1995 in Western Australia those who elected to stay in the workforce beyond 65 are just reaching 75 and over. The evidence in the data is that decline and withdrawal from volunteer work tends to occur in greater numbers at 75 plus, and so the onset of functional ageing is likely to begin to be an issue in the paid workforce in the next few years. If managers in the paid workforce are to be prepared for the effects of functional ageing then training and support which enables them to benefit from the experience of older volunteers and their managers is required. Their ability to work out "what's going on here?" when changes in capability or variations in performance occur, and to work out "what action needs to be taken?" will be enhanced by training which helps them to determine the nature of the variation or change:
• physical change – which reduces the individual's capability to walk distances, climb on roofs, push wheelchairs, read rosters or hear in meetings;
• cognitive change – either associated with normal ageing which may slow the processes or require aids for memory; or
• changes associated with early signs of dementia and related illnesses:
  and
• behavioural changes - which are not associated with ageing but are merely poor performance; or
• changes associated with early signs of dementia and related illnesses.

In addition training and education which opens up understanding of dementia and related illnesses, and which encourages open communication and discussion will enable organisational members to assist sufferers with early identification and intervention in accordance with the best current advice from the medical profession. These are different types of training needs to those usually addressed by university studies or corporate training. They require personal and interpersonal self awareness and understanding.

Finally, incorporation of dialogue and a partnership approach into strategies to manage poor or declining performance, whatever the cause, will assist in the prevention of inadvertent discrimination against older workers which occurs because of inaccurate diagnosis of "what's going on here?" as being associated with ageing even when it is not, and of the adoption of demeaning task oriented or overly solicitous people oriented approaches by managers who are inadequately equipped to manage the performance of older people.

7.4.2 Social construction and volunteering

The evidence in this research is that within the field of study volunteers and volunteering are defined in relation to paid work. In general terms this is to be expected given that the absence of payment and the voluntary nature of the act are things which are seen to characterise volunteering. The complexity associated with pinning down a definition of volunteering, and the fact that the lack of agreement or understanding has meant that volunteering is yet to be adequately measured or valued in quantitative terms are factors which contribute to ambiguity in the status of volunteering. Volunteering is seen to be both altruistic and somehow above paid
work, while at the same time viewed as not as important as paid work in terms of organisational support and infrastructure. This in turn leads to the lower status of volunteering in organisations, and the lack of support and status afforded managers of volunteers and their programmes. Such lack of support and status means that at times managers of volunteers are ill-equipped to manage complex management situations such as the possible deterioration of the performance of an individual.

Addressing this takes three forms at three levels – societal, organisational and managerial. At the society level the development of shared understanding and clear definitions will come with the development of the discipline and its movement from pre-paradigmatic or neo-disciplinary to a more complex state which includes critical thinking, theory building and discourse. It will also be achieved when “measurement” occurs in a more consistent manner and recognition of the value of volunteering becomes more than rhetoric. This state will take time and will better occur once the efforts at conceptualisation and measurement achieve some consistency and constancy. This will allow data to be collected along agreed lines, and in a manner which makes it possible for data from one decade to be compared with the next, and allows the value of volunteering to be compared with the value of paid work in language which will be understood by cross disciplinary experts and lay people alike.

At the organisational level recognition of the importance of good management practice which meets the needs of the volunteers and the needs of the organisation including those of clients and other stakeholders is required. Such recognition will come from viewing volunteering programmes as more than an add on or money saving activity for the organisation. Actions which will reinforce such recognition include paying managers competitive wages, providing them with organisational infrastructure and support, and particularly in relation to this study, providing managers with training which will empower them to adequately assess and evaluate performance, and comfortably provide feedback to volunteers based on sound evaluations.

At the managerial level the establishment of clear expectations, adequate feedback mechanisms and appropriate remedies will help to create an environment in which the management process is open, well understood and effective.
7.4.3 Understanding the social construction of age

None of the managers in this study are overtly ageist or would believe that they hold prejudices against older people. Despite this there was evidence that at times their evaluation or judgement of the performance of a volunteer they considered to be older was coloured or influenced by the age of the volunteer. The social construction of ageing and the assumptions inherent in our society about performance changes associated with ageing led managers to classify behaviour which was out of character or unusual for a volunteer as decline due to ageing. Thus even when the change in performance may not be age related it was classified as such. Conversely when asked to identify “older” volunteers managers referred to activity and performance, illustrating an expectation of declining performance being associated with ageing. Accompanied by a lack of conversation about ageing and decline this serves to have changes in behaviour classified as age related performance decline and not addressed directly or at all on some occasions. It is clear, however, that older people, at least those who participated in this study, would prefer to be told when their performance declines, and a direct approach taken to managing this. Further they would prefer not to be treated any differently to their younger counterparts. On this basis we should open up dialogue about ageing and age related decline, educate one another about what it is and isn’t and improve our understanding. We should also not be so quick to relate changes in performance to ageing. In this way we can help to reduce the impact of the social construction of ageing on our management techniques – including the evaluation and management of performance.

7.5 GENERALISABILITY OF THIS RESEARCH

The results of this study can be seen as an interpretation of what is going on according to the subjective frame of reference of the actors in this particular study. Given that cross case analysis has been undertaken and the development of theory has been grounded in data across more than one specific case, it is possible to make inferences from these specific instances to the wider social environment at least on those categories which were saturated in data analysis. This is a relatively small scale study, however much of that which has been found is consistent with other work which has been done elsewhere. In keeping with the approach recommended by Williams (2002) *moderatum* generalisations, that is generalisations which recognise
the strengths and weaknesses of interpretive research, can be made and the findings of this research considered to be generalisable to the degree that the findings can help inform management of older volunteers in Australia.

7.6 POTENTIAL FOR FUTURE RESEARCH

Future research options are many but there are a couple of areas which demand attention. Firstly there is scope to further explore the social construction of ageing as an influence on sensemaking for managers of older people both paid and unpaid. As the workforce ages, and as more older volunteers are recruited as the "reserve army" (Warburton, Le Broque & Rosenman, 1998), managers of paid and unpaid workers are going to be confronted with changes in performance in older people more and more frequently. The way in which social construction of ageing feeds into the "what's going on here?" and "what action is required?" processes for managers across a broader spectrum of organisations and across a broader spectrum of management responsibilities is an issue for further exploration. Does this social construction influence judgements in recruitment and selection of volunteers? of paid workers? Does it influence allocation of work tasks? The evidence here is that it might and in-depth exploration of this would help in the development of tools to educate managers about managing older people – even if only to help dispel myths and stereotypes which permeate our way of thinking – our social construction of ageing.

A second area for research is the influence that opening up community discourse on ageing will have on the social construction of ageing. One of the methodological gains of this research was the evidence that groups who had not previously discussed ageing, especially functional ageing, went through a progression in understanding during discussions in group interviews for this research. This opens up the possibility that increasing discussion in workplaces in particular is a viable option for educating workers and managers about ageing, including educating people about the research which indicates that the earlier a person becomes aware of the early indications of dementia the more they may be able to do to delay its effects (Access Economics, 2003; Alzheimer's Association, n.d.).
A third area with potential for future research is the exploration of peer evaluation as a tool for performance management - this time in the context of Human Resource Management. This study did not have as its central focus formal performance appraisal/performance management systems. The PEPping system which was investigated in the voluntary association arose as a by-product of this research, and while it was valuable in highlighting some key elements of volunteer management in other organisations, and highlighted some of the key areas for data analysis and categorisation, it was not investigated as a performance management system per se.

7.7 LEGITIMATION

In positivist research reliability and validity of the research are discussed in terms of objectivity, generalisability, precision and confidence. When working in an interpretivist framework, however, the issues are different. Merriam (1998) suggests that certain characteristics should be present to legitimate the trustworthiness of the data, its analysis and interpretation. These characteristics include prolonged engagement of the researcher with the data sources and persistent observation of emerging issues; a process whereby working hypotheses or emerging stories are systematically tested against the evidence (an iterative process); clarity about the role of the researcher and the assumptions and biases which the researcher has. These elements have been clearly set out in this thesis. Merriam also suggests peer debriefing – someone who plays devil’s advocate and questions the research processes and outcomes; member checks – where informants are presented with findings and theories as they emerge to “test” their credibility against the informants’ experiences and views and rich thick data descriptions which allow the reader to consider and make decisions about transferability to another context. In the PhD setting this role is undertaken by the supervisors, and on this occasion the presentation of preliminary papers at conference (Paull, 2006) serves to assist with this role. A final suggestion made by Merriam is an external audit which allows an external consultant to examine both the process and product of account; examines whether findings, interpretations and conclusions supported by data – this role perhaps repeated by examiners in the case of a PhD dissertation. These suggestions by
Merriam have been lauded by Cresswell (1998) as being “one of the best found in qualitative text books”.

7.8 LIMITATIONS AND BENEFITS OF THIS RESEARCH

7.8.1 Limitations of this research

This research is largely exploratory in nature, and the findings will need to be further tested and refined. Interpretive research aims for discovery and exploration. Confining the research to Western Australia, to formal volunteering in organisations where there is a designated manager or co-ordinator, and to six case study organisations has limited the scope and arguably its generalisability as discussed above. The scope and breadth are seen as being countered by the depth offered by undertaking a qualitative, multi-case study approach. A final stage of presentation of the findings at conferences and workshops, and in refereed and practitioner publications will serve to offer them for criticism and debate, thus promoting further understanding of the issues and concerns raised by the managers and co-ordinators of older volunteers. The research is intended to be a precursor to dialogue in the field of study.

7.8.2 Benefits of this research

The benefits of this research have been identified as being a contribution to the body of knowledge on the management of volunteers which is growing in an area of concern to practitioners in the field. In the workshop held in July 2001 to explore whether this was a suitable topic for research varying views emerged and it became apparent that the complexities of the topic made it a suitable topic for research. There is increasing discussion of the “Baby Boomer” generations as they reach retirement age. Much is being written about older volunteers being a rich resource for organisations, and older volunteers will benefit from a better understanding of their needs as they volunteer. Managers in volunteer-involving organisations will have a clearer understanding of the issues associated with the management of older volunteers. This research will provide benefits for volunteers, volunteer-involving organisations, and the people charged with the management of volunteers. In addition the development of findings which can contribute to the successful management of
paid older workers is both timely and important in the context of the ageing workforce.

**7.9 Megan's Story Part 2**

7.9.1 On a personal level

During the course of this research, not only have I engaged with the research as a participant in the volunteering field, I have also noted events in my personal life, and the lives of those around me which have had an influence on my thinking or where my research has influenced my actions. Some examples of this have been the somewhat sudden and extremely incapacitating illness which afflicted Pat, a close friend of my mother, and which made the concept of "decline" both personal and painful. To see a woman who has been a part of my life since I was a toddler, and who was the same age as my father, struck down with physical incapacity while still having her cognitive capabilities had a profound effect on me, as well as on Pat and her family. Sadly, but perhaps a blessing as well, Pat passed away in August of 2006. Medical science has had little success identifying the cause of her incapacity.

My husband's grandmother, having survived the death of her son (my father-in-law) in October of 2006, passed away at 98 just before Christmas of 2006. Her situation made me conscious of the way staff in the aged care facility in which she was a resident, and others, spoke to her as if not only was she hard of hearing, but also unable to understand them. While she occasionally got the names of her great-grandchildren mixed up, and in the last few months had some difficulty remembering what she had told to whom, her cognitive capabilities were fabulous for her age, and even in the last week of her life she was dictating letters to relatives to ensure that her wishes were carried out once she had passed away. Her frailty meant that she was not as able to get about as before, but my observations of people making decisions for her rather than asking her to make her own decisions, and to feel the urge to do the same myself when I was in a hurry, cast a different light on my research.

Other events diaryed and memoed included: jokes with my supervisors about failing memory or failing eyesight as if these must be a product of ageing when in fact

*Continued from Chapter 1*
they are more likely to be the result of busy lives and hours in front of the computer; feeling the hackles rise when I hear someone refer to an older person as "dear" or "pet" in a patronising tone; and the discussion with my daughter and her friend about feeling a little nervous of mixing with the elderly residents in a residential care facility as part of their community service for their higher school certificate; and my discussions with my parents about the impact of health changes on their ability to do the things they would like to, and their frustrations about their changing capabilities.

Finally I have become conscious of how little I know about dementia. While reading Sue Pieters-Hawke's book about the way the illness affected the former wife of former Prime Minister Bob Hawke, I began to realise that it is possible that despite all our efforts to engage the individual in decisions about their own wellbeing and future, there may come a time when cognitive decline, in the form of illness, may mean that age related decline deprives us of our capacity to make decisions for ourselves.

7.9.2 In the research context

A final insight into Megan the researcher, has been that while I had already migrated from quantitative to qualitative research as my preferred mode of investigation, I had not yet fully grasped the move from positivist to interpretivist until after this study was well underway. Constantly, both as I write and as I talk, and in discussions with my supervisors and others, I found myself slipping back to a positivist framework, in part due to the nature of much of the research training I had undertaken, and the literature with which I am familiar.

It is said that a PhD is a rite of passage, a key to entrée to The Academy, but it has been more than that. It has been a personal journey of discovery and the hours of writing, rewriting, analysis and interpretation have yielded discoveries of self that have been uncomfortable, but which have served to prioritise values, reveal previously unacknowledged assumptions and develop an appreciation of advancing age in a way which I hope will serve me well in years to come.

My story is not central to this research. It is the voices of the volunteers and their managers which is central. My involvement as a researcher, and that which I bring to interpretation of the data, however, are both elements of the approach which has been undertaken in this study.
7.10 SIGNIFICANCE AND CONCLUSION

This study investigated the experiences of managers and older volunteers particularly where the manager perceives that a volunteer's performance is declining due to age. I have argued that there was a gap in the literature which was also an expressed concern of managers of volunteers. As has been discussed it has implications for managers and volunteers, and for the organisations in which they operate, and for managers and workers in the paid workforce as the ageing of the workforce continues. It is significant for several reasons.

- It offers an in-depth exploration of the experiences managing of older volunteers from the perspectives of both managers and volunteers.
- It explores the manager's understanding of "declining" performance and explains how manager sensemaking contributes to this understanding.
- It offers a direction for research into the management of the performance of older workers in the paid workforce.

The first contribution flows from a lack of a comprehensive in-depth examination of the experiences of older volunteers and managers. Given that older volunteers are being actively recruited to participate in volunteer-involving organisations (e.g. Heartbeat Trends, 2001; TEAM Consultants, 2001) and that older volunteers tend to contribute more hours to the organisations in which they work (Lyons, 2001), their management is an important issue for managers and organisations. Managers have indicated that managing older volunteers is somehow different to managing other volunteers (Paul, 2000). An understanding of this can only contribute to better management. In addition, this study contributes to an understanding of the status of volunteers and volunteer managers within organisations, and within society, and the impact this has on the capacity of the manager to undertake their role.

This study is also significant in gaining insight into what managers perceive as "declining" performance by older volunteers. It identifies that functional ageing contributes to a range of changes which do affect the capabilities of volunteers, but that at times changes in behaviour are attributed to the ageing process when perhaps they may not be. It identifies that volunteers self-manage, and that a peer partner approach by the manager where the manager notices changes in the capabilities of the
volunteer is both appropriate in terms of the capabilities approach, and desired by volunteers themselves.

A third and related significance of this study is the contribution to understanding the management of older people in the paid workforce. Managers of volunteers have been tackling performance issues with older volunteers for a long time, whereas many paid managers have not yet experienced managing older people over the traditional retirement age. The introduction of anti-age discrimination laws, and the abolition of compulsory retirement at 65 means that some of the experiences of managers of older volunteers can provide insights which are useful to managers of older workers. This thesis contributes to the growing literature on the social construction of age and how this can lead to unwitting discrimination against older people on the basis of assumptions which are made about their capabilities, and about how to address changes in capabilities.

At this time with an ageing workforce this research has contributed valuable insights into the management of older workers. Social construction of age and the “undiscussability” of the ageing process lead to uncertainties and evasions on the part of managers who classify declining performance in an older worker as being age related. In the paid workforce with the abolition of compulsory retirement and with labour shortages leading to policies designed to keep older people in the workforce, research which investigates the management of older workers is both important and necessary. This thesis has taken one step in the conduct of such research.

The methodological gains derived from the approach taken in this study can also be considered to be a significant contribution to knowledge. In-depth exploration of the actors’ points of view yielded evidence about sensemaking processes encountered by managers and volunteers, about a progression in understanding which highlighted the importance of dialogue on ageing and performance, and about emotional barriers which impede such dialogue. The employment of sensemaking as a diagnostic tool offered insights which might not otherwise have been available, and allowed an exploration of the social construction of ageing and of volunteering.

In conclusion this study offers directions for practice in terms of training and awareness raising for managers about functional ageing and work performance, it advocates increased communication and awareness raising about ageing, removing the “undiscussability” of this sensitive subject, and it further lends support to the
promotion and recognition of volunteering as is already being undertaken by peak bodies such as Volunteering Australia. This study also illustrates the value of in-depth exploration of management issues, and demonstrates how such exploration can contribute to a better understanding of the interactions within organisations. The adoption of sensemaking as a diagnostic tool has been shown to be beneficial in understanding those interactions and the context in which they occur.
LIST OF REFERENCES


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ALP see Australian Labor Party (WA)


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McNair Ingenuity Research and Fundraising Institute – Australia (FIA). Canberra: Australian Government Department of Family and Community Services.


Smith, A. C., & Green, F. (1993). Managing employees as if they were volunteers. SAM Advanced Management Journal, 58, (3), 42-46.


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APPENDIX A  PHASE ONE – SURVEY FORM – ORGANISATIONS

Including covering letter
Dear Co-ordinator or Manager of Volunteers,

I am a PhD candidate in the School of Management at Edith Cowan University, Perth. I am conducting research about older volunteers and seek your assistance in this process.

Enclosed is a survey which you are asked to complete and return by posting it in the reply paid envelope provided by July 29th, 2003.

The remainder of this letter contains information about my research and provides details about anonymity and confidentiality and what will happen to the information you provide. If you have any questions please contact me on 9310 1285.

Purpose of the study

I recently completed research into the use of feedback to manage the performance of volunteers and in the course of this research I identified a concern amongst volunteer managers and co-ordinators that there are times when performance decline in older volunteers can pose dilemmas for the organisation. With an ageing population, volunteering is being actively promoted for older people, both for the benefit of the community and the increase of social capital, and for the improved health and wellbeing of older people. I am now embarking on a research project to examine this sensitive area. The overall aim of my research is to examine the concern from the perspectives of both the managers and the volunteers and to develop a framework which may guide and inform practice.

What is involved?
The research project is in two parts with the first part involving surveys of older people and of organisations to gather contextual information about the experiences of older volunteers. In the second part I will be conducting group discussions and individual interviews to gain an understanding of the experiences and perceptions of managers and of volunteers in volunteer-involving organisations.

What will happen to the data collected?

Data collected in this first survey phase will be collated and entered into a computer programme for analysis. There are no names attached to the survey forms and the PAF will handle the mail out and returns so that the names and addresses of participants are not provided to me.

For the second part of the study I intend to record and transcribe the interviews so that the contributions of participants are accurately captured. In the transcription process,
identifying names of agencies and individuals will not be transcribed and the tapes will be erased once the final thesis is accepted by the University Research and Higher Degrees Committee. At no time will details of participants be stored with the data collected.

Data collected will be used for analysis and discussion for my final report, and may be used in preparing a discussion documents for publication, possibly in an academic journal or at a workshop.

Confidentiality and anonymity:

The data collected in this study will not be stored with your name. At no time will particular individuals be identified and the written report will not attribute particular statements to any organisation or individual by name. However due to the unique nature of some of the work undertaken by volunteers it may be possible for individuals to be identified by those who are familiar with them and their work.

Results:

The results of this study will form part of the thesis to be prepared for submission to fulfill the requirements for the award of the Doctor of Philosophy (Business Studies). The data collected will be analysed and cross case and comparative analysis conducted in the development of a framework to guide and inform practice. The final thesis will be placed in the library collection at the University, and it has been agreed that the Volunteering Western Australia and the Positive Ageing Foundation will also receive copies for their libraries. Further, the outcomes of the study may also form the basis of other publications and research, workshops and presentations by the researcher.

Potential benefits to you and others:

By participating in this study you will contribute to the development of greater understanding of this topic. It is hoped that the final research outcomes will increase the body of knowledge on the management of volunteers, in particular older volunteers, and on the management of performance generally. Managers and supervisors of volunteers have expressed concern that this is a particularly difficult area and it is hoped that this study will assist them in this task.

I look forward to analysing the information provided to me by those who complete this survey. Thank you for your assistance with my research.

Yours faithfully,

Megan Paull
OLDERS VOLUNTEERS

PRELIMINARY SURVEY - ORGANISATIONS

➢ This survey forms part of a study investigating the management of older volunteers.

➢ It aims to develop a preliminary profile of the management of older volunteers in Western Australia.

➢ Completion of the survey should take you approximately fifteen minutes.

➢ Unless otherwise indicated you are asked to tick the answer which most closely represents your immediate response to the questions.

➢ When the term manager is used it refers to the person with responsibility for organising, co-ordinating or managing volunteers in your organisation, even if this person is another volunteer or a paid staff member with other responsibilities.

This is an anonymous survey. Please ensure that you do not write your name, or any other identifying information on the form. By completing this survey you are consenting to take part in this research. As such you should first read the enclosed letter carefully as it explains fully the intention of this project. The issues covered by this survey can sometimes be sensitive and the answers you provide will be handled carefully. In answering the questions will assist me in researching this topic so that I may explore the common themes and issues experienced across organisations.

If you have any concerns about the survey please contact me on 9310 1286 or one of my supervisors:
   Dr Allen Clabaugh : 9273 8754
Or Dr Patricia Morrigan on p.morrigan@ecu.edu.au

Alternatively you may prefer to contact
Louise Weaver at Volunteering WA on 9420 7288.

Megan Paull
Doctoral Candidate
Edith Cowan University
Part A: Your organisation

1. What type of work is your organisation primarily involved in?
   - Community/Welfare [ ]
   - Education/youth/training [ ]
   - Religious [ ]
   - Health [ ]
   - Sport and recreation [ ]
   - Other [ ]

2. How many volunteers are involved in your programme in 2003? 

3. How many volunteers involved in your programme are aged 55 and over? 

4. Of the total number of volunteers involved in your programme in 2003 please specify the approximate number in each age group as follows (groups are not of equal size):
   - Below 18 years of age __________ 
   - 18-24 yrs __________ 
   - 25-34 yrs __________ 
   - 35-44 yrs __________ 
   - 45-54 yrs __________ 
   - 55-59 yrs __________ 
   - 60-64 yrs __________ 
   - 65-69 yrs __________ 
   - 70-74 yrs __________ 
   - 75-79 yrs __________ 
   - 80-84 yrs __________ 
   - 85+ yrs __________ 

5. What tasks are undertaken by volunteers in your organisation/program? (Tick more than one as necessary)
   - Administration/clerical/recruitment [ ]
   - Coaching/refereeing/judging [ ]
   - Performing/media production [ ]
   - Befriending/supporting/listening/counselling [ ]
   - Fundraising/sales [ ]
   - Preparing/serving food [ ]
   - Transporting people/goods [ ]
   - Repairing/maintenance/gardening [ ]
   - Management/committee work/co-ordination [ ]
   - Personal care/assistance [ ]
   - Teaching/instruction/providing information [ ]
   - Other (please specify) __________________________ [ ]
6. Which of these activities are undertaken by volunteers aged 55 and over? (Tick more than one as necessary)

Administration/clerical/recruitment
Coaching/refereeing/judging
Performing/media production
Befriending/supporting listening/counselling
Fundraising/sales
Preparing/serving food
Transporting people/goods
Repairing/maintenance/gardening
Management/committee work/co-ordination
Personal care/assistance
Teaching/instruction/providing information
Other (specify)

7. Do volunteers receive training in your organisation?

On the job
Formal training on joining (orientation/induction)
At regular sessions along the way
At times of change
As things go wrong

8. What insurance cover do you currently have in place relating to volunteers? (Tick as many as necessary)

Nil
Personal Accident
Motor vehicle
Fidelity
Directors and office bearers
Public Liability
Other (Please specify)

9. With your insurance cover are there any restrictions or limitations that relate to volunteers over 55?

YES [] NO [] DON'T KNOW []

If NO go to Q12
If DON'T KNOW go to Q12
10. From what age does insurance cover reduce or limit benefits for volunteers?

<table>
<thead>
<tr>
<th>Age</th>
<th>□</th>
</tr>
</thead>
<tbody>
<tr>
<td>55</td>
<td></td>
</tr>
<tr>
<td>60</td>
<td></td>
</tr>
<tr>
<td>65</td>
<td></td>
</tr>
<tr>
<td>70</td>
<td></td>
</tr>
<tr>
<td>75</td>
<td></td>
</tr>
<tr>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>□</td>
</tr>
<tr>
<td>Don't know</td>
<td>□</td>
</tr>
</tbody>
</table>

Please specify __________________________

11. If age-related restrictions or limitations apply have these led to:

(a) Loss of current volunteers? 
YES [ ] NO [ ] DON'T KNOW [ ]

(b) Unwillingness to recruit above that age? 
YES [ ] NO [ ] DON'T KNOW [ ]

(c) Policy not to recruit above that age? 
YES [ ] NO [ ] DON'T KNOW [ ]

(d) People choosing not to volunteer with your organisation? 
YES [ ] NO [ ] DON'T KNOW [ ]

(e) No effect noticed? 
YES [ ] NO [ ] DON'T KNOW [ ]

(f) Other (Please specify) __________________________

Part B: Policy

12. Does your organisation have a retirement age for volunteers? 
YES [ ] NO [ ] DON'T KNOW [ ]

If NO go to Q13
If DON'T KNOW go to Q 13

(a) Does it apply 
across all roles YES [ ] NO [ ] DON'T KNOW [ ]
to specific tasks YES [ ] NO [ ] DON'T KNOW [ ]

If YES please indicate which tasks __________________________

______________________________
(b) Is it
formal (endorsed or written) policy
YES [ ] NO [ ] DON'T KNOW [ ]
current practice
YES [ ] NO [ ] DON'T KNOW [ ]

(c) What is the reason for this policy or practice?


13. Does your organisation have any other formal written policy guidelines regarding the involvement of volunteers?

YES [ ] NO [ ] DON'T KNOW [ ]
If NO go to Q15
If DON'T KNOW go to Q15

14. Does your organisation have any other formal written policy guidelines, regarding volunteers over 55, other than those required by insurance cover?

YES [ ] NO [ ] DON'T KNOW [ ]
If NO go to Q15
If DON'T KNOW go to Q15
If YES please specify what these relate to __________

15. Does your organisation have any other formal written policy guidelines, regarding volunteers in other age groups (e.g. youth), other than those required by insurance cover?

YES [ ] NO [ ] DON'T KNOW [ ]
If NO go to Q16
If DON'T KNOW go to Q16
If YES please specify what these relate to __________
Part C: Involving older volunteers

16 (a). Please list the benefits you have found in involving people aged over 55 as volunteers in your organisation:

16 (b). Please list the main disadvantages you have found in involving people aged over 55 as volunteers in your organisation:

17. Have you encountered difficulties with declining performance due to age with any of your older volunteers?

YES [] NO [] DON'T KNOW []

18. Would you say this is a

   major problem [ ]
   minor problem [ ]
   occasional problem [ ]
   rarely a problem [ ]
   not a problem at all [ ]
19. Have you developed strategies to manage performance of volunteers?

YES [ ] NO [ ] DON'T KNOW [ ]

If NO go to Q20
If DON'T KNOW go to Q20

If YES Do these strategies include consideration of the age of the volunteer?

YES [ ] NO [ ] DON'T KNOW [ ]

20. In your experience do volunteers aged 55 and over on average:
(Please note - you may feel that you are repeating yourself - this set of questions is designed to make the answers from different organisations comparable, please answer them even if you are repeating information already provided.)

(a) stay less time with the organisation than younger volunteers

YES [ ] NO [ ] DON'T KNOW [ ]

(b) volunteer less hours per week than younger volunteers

YES [ ] NO [ ] DON'T KNOW [ ]

(c) require less support than younger volunteers

YES [ ] NO [ ] DON'T KNOW [ ]

(d) require less supervision than younger volunteers

YES [ ] NO [ ] DON'T KNOW [ ]

(e) require less training than younger volunteers

YES [ ] NO [ ] DON'T KNOW [ ]

(f) adapt to change more easily than younger volunteers

YES [ ] NO [ ] DON'T KNOW [ ]
Part D: Some questions about you and your position

21. As the person responsible for volunteer activities in your organisation/programme are you:

- A paid volunteer co-ordinator/manager [ ]
- An unpaid volunteer co-ordinator/manager [ ]
- A paid officer with other duties [ ]
- An unpaid volunteer with other duties [ ]
- Committee member [ ]
- Other [ ]
(please specify) ________________________________

22. How long have you been the person responsible for volunteer activities

In total ______ (yrs, mths)
In this organisation ______ (yrs, mths)

23. Does your organisation require specific qualifications for your position?

YES [ ] NO [ ] DON'T KNOW [ ]

If YES please provide brief detail
(e.g. Certificate IV in Volunteer Management)

____________________________________________________

24. Does your organisation require specific training for your position?

YES [ ] NO [ ] DON'T KNOW [ ]

If YES please provide brief detail
(e.g. induction programme)

____________________________________________________

If you have any comments suggestions or observations about the survey or about involving older volunteers in organisations please use the space below – your experience will be invaluable in making this study relevant to volunteers and volunteer organisations.

Thank you for taking the time to complete this survey.
Megan Paull
Researcher

316
APPENDIX B  PHASE ONE – SURVEY FORM – OLDER PEOPLE

Including covering letter
Dear Research Group Member,

I am a PhD candidate in the School of Management at Edith Cowan University, Perth. I am conducting research about older volunteers and seek your assistance in this process.

Enclosed is a survey which you are asked to complete and return by posting it in the reply paid envelope provided by July 11th 2003.

The remainder of this letter contains information about my research and provides details about anonymity and confidentiality and what will happen to the information you provide. Please feel free to contact me on 9310 1286 if you have any questions about my research.

**Purpose of the study**

I recently completed research into the use of feedback to manage the performance of volunteers and in the course of this research I identified a concern amongst volunteer managers and co-ordinators that there are times when performance decline in older volunteers can pose dilemmas for the organisation. With an ageing population, volunteering is being actively promoted for older people, both for the benefit of the community and the increase of social capital, and for the improved health and wellbeing of older people. I am now embarking on a research project to examine this sensitive area. The overall aim of my research is to examine the concern from the perspectives of both the managers and the volunteers and to develop a framework which may guide and inform practice.

**What is involved?**

The research project is in two parts with the first part involving surveys of older people and of organisations to gather contextual information about the experiences of older volunteers. In the second part I will be conducting group discussions and individual interviews to gain an understanding of the experiences and perceptions of managers and of volunteers in volunteer-involving organisations.

**What will happen to the data collected?**

Data collected in this first survey phase will be collated and entered into a computer programme for analysis. There are no names attached to the survey forms and the PAF will handle the mail out and returns so that the names and addresses of participants are not provided to me.
For the second part of the study I intend to record and transcribe the interviews so that the contributions of participants are accurately captured. In the transcription process, identifying names of agencies and individuals will not be transcribed and the tapes will be erased once the final thesis is accepted by the University Research and Higher Degrees Committee. At no time will details of participants be stored with the data collected.

Data collected will be used for analysis and discussion for my final report, and may be used in preparing a discussion documents for publication, possibly in an academic journal or at a workshop.

Confidentiality and anonymity:

The data collected in this study will not be stored with your name. At no time will particular individuals be identified and the written report will not attribute particular statements to any organisation or individual by name. However due to the unique nature of some of the work undertaken by volunteers it may be possible for individuals to be identified by those who are familiar with them and their work.

Results:

The results of this study will form part of the thesis to be prepared for submission to fulfill the requirements for the award of the Doctor of Philosophy (Business Studies). The data collected will be analysed and cross case and comparative analysis conducted in the development of a framework to guide and inform practice. The final thesis will be placed in the library collection at the University, and it has been agreed that the Volunteering Western Australia and the Positive Ageing Foundation will also receive copies for their libraries. Further, the outcomes of the study may also form the basis of other publications and research, workshops and presentations by the researcher.

Potential benefits to you and others:

By participating in this study you will contribute to the development of greater understanding of this topic. It is hoped that the final research outcomes will increase the body of knowledge on the management of volunteers, in particular older volunteers, and on the management of performance generally. Managers and supervisors of volunteers have expressed concern that this is a particularly difficult area and it is hoped that this study will assist them in this task.

I look forward to analysing the information provided to me by those who complete this survey. Thank you for your assistance with my research.

Yours faithfully,

Megan Paull
Preliminary Survey – Older Volunteers

➢ This survey forms part of a study investigating the involvement of older volunteers. (The term "older volunteers" is used to make the distinction from "senior" volunteers who may have seniority by having been in the organisation longer.)

➢ The aim of the study is to help develop a profile of the management of older volunteers in Western Australia.

➢ This survey should take you approximately fifteen minutes to complete.

➢ Unless otherwise indicated, you are asked to tick the answer which most closely represents your immediate response to the questions.

➢ When the term "manager" is used it refers to the person with responsibility for organising, co-ordinating or managing volunteers in your organisation – even if they are another volunteer, or their work involves more than managing volunteers.

This is an anonymous questionnaire. Please ensure that you do not write your name, or provide any other information that could possibly make you identifiable. By completing this survey you are consenting to take part in this research. As such you should first read the accompanying information which explains the intention of this project.

The issues covered by this survey can sometimes be sensitive and the answers which you provide will be handled confidentially. In answering the questions you will assist me in researching this topic so that I may explore the common themes and issues experienced by organisations and by volunteers.

If you have any concerns about the questionnaire please contact me by telephone on 9310 1286

or either of my supervisors:

Dr Allen Clabaugh : 9273 8639
Or Dr Patricia Morrigan on p.morrigan@ecu.edu.au

Alternatively it may be more convenient to contact Louise Weaver at Volunteering Western Australia on 9420 7288.
Part A: Some questions about you – please tick [✓] appropriate box

These 6 questions will provide basic information about you so that a profile of respondents can be developed.

1. Gender: Female [ ] Male [ ]
2. Age in years: 50-54 [ ] 55-59 [ ] 60-64 [ ] 65-69 [ ] 70-74 [ ] 75-79 [ ] 80-84 [ ] 85+ [ ]
3. Postcode
4. Were you born in Australia? Yes [ ] No [ ]
   If you were born outside Australia please indicate where
5. Is English your first language? Yes [ ] No [ ]
   If English is not your first language please indicate your first language
6. Are you an Indigenous Australian or Torres Strait Islander? Yes [ ] No [ ]

There are many definitions of volunteer.
A volunteer is someone who willingly gives unpaid help in the form of time, service and skills. Unless otherwise specified in this survey, all questions refer to volunteer work undertaken through or with an organisation or group.

7. Do you consider yourself to be an active volunteer?
   YES [ ] Go to Part B Over page
   NO [ ] Go to Part C On page
Part B: About your volunteer work

10. How many hours of formal volunteering have you undertaken in the last month?

   Approximately ____ hours

11. What type of organisations have you volunteered with in the past 12 months?

   (Tick as more than one as necessary)

   - Community/Welfare
   - Education/youth/training
   - Religious
   - Health
   - Sport and recreation
   - Other Please identify ________________

12. What type of volunteer activity have you undertaken in the past 12 months?

   (Tick more than one as necessary)

   - Administration/clerical/recruitment
   - Coaching/refereeing/judging
   - Performing/media production
   - Befriending/supporting/listening/counselling
   - Fundraising/sales
   - Preparing/serving food
   - Transporting people/goods
   - Repairing/maintenance/gardening
   - Management/committee work/co-ordination
   - Personal care/assistance
   - Teaching/instruction/providing information
   - Other (specify) __________________

13. Which activity have you spent the most time on in the last 12 months?

   (Tick more than one as necessary)

   - Administration/clerical/recruitment
   - Coaching/refereeing/judging
   - Performing/media production
   - Befriending/supporting/listening/counselling
   - Fundraising/sales
   - Preparing/serving food
   - Transporting people/goods
   - Repairing/maintenance/gardening
   - Management/committee work/co-ordination
   - Personal care/assistance
   - Teaching/instruction/providing information
   - Other (specify) __________________
14. How long ago did you first become involved in voluntary work for any organisation?

<table>
<thead>
<tr>
<th>Duration</th>
<th>[ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>[ ]</td>
</tr>
<tr>
<td>1-5 years</td>
<td>[ ]</td>
</tr>
<tr>
<td>6-10 years</td>
<td>[ ]</td>
</tr>
<tr>
<td>More than 10 years</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

15. How did you first become involved in voluntary work?

<table>
<thead>
<tr>
<th>Reason</th>
<th>[ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knew someone involved</td>
<td>[ ]</td>
</tr>
<tr>
<td>Someone asked me</td>
<td>[ ]</td>
</tr>
<tr>
<td>Self involvement in organisation</td>
<td>[ ]</td>
</tr>
<tr>
<td>Saw advertisement/report in media</td>
<td>[ ]</td>
</tr>
<tr>
<td>Found out about it myself</td>
<td>[ ]</td>
</tr>
<tr>
<td>Other (specify)</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

16. What are your current reasons for being a volunteer?

(Tick more than one as necessary)

<table>
<thead>
<tr>
<th>Reason</th>
<th>[ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal/family involvement</td>
<td>[ ]</td>
</tr>
<tr>
<td>Personal satisfaction</td>
<td>[ ]</td>
</tr>
<tr>
<td>Social contact</td>
<td>[ ]</td>
</tr>
<tr>
<td>Religious beliefs</td>
<td>[ ]</td>
</tr>
<tr>
<td>To be active</td>
<td>[ ]</td>
</tr>
<tr>
<td>To learn new skills</td>
<td>[ ]</td>
</tr>
<tr>
<td>To do something worthwhile</td>
<td>[ ]</td>
</tr>
<tr>
<td>Help others/community</td>
<td>[ ]</td>
</tr>
<tr>
<td>Gain work experience</td>
<td>[ ]</td>
</tr>
<tr>
<td>Use skills/experience</td>
<td>[ ]</td>
</tr>
<tr>
<td>Felt obliged</td>
<td>[ ]</td>
</tr>
<tr>
<td>Just happened</td>
<td>[ ]</td>
</tr>
<tr>
<td>Other (specify)</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

17. Overall how satisfied are you with the volunteer work you have been involved over the past 12 months?

<table>
<thead>
<tr>
<th>Level</th>
<th>[ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very satisfied</td>
<td>[ ]</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
18. To what extent do you agree or disagree with the following statements about your volunteering

<table>
<thead>
<tr>
<th>Completely</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) I enjoy the work I do as a volunteer</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>(b) I feel I am doing something worthwhile</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>(c) I worry about my ability to do the work</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>(d) The work keeps my brain active</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>(e) I feel I am getting too old</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>(f) I would like to use my skills more</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>(g) I would like to have more responsibility</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>(h) I find the work very interesting</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

19. Are there any particular aspects of your volunteer work you have been dissatisfied with?

- NO [ ]  
- YES [ ]

If YES please specify below

20. Do you intend/expect to volunteer more/less or about the same as you do now in five (5) years time?

- More [ ]
- Less [ ]
- About the same [ ]

If you do not intend/expect to volunteer in the future please tick [ ] and then go to Q22

21. What are the main reasons (in order of priority) you intend to volunteer in the future?
22. What are the main reasons you might NOT volunteer in the future, or you might volunteer less in the future?

23. In your experience do volunteers aged 55 and over on average:

(a) stay less time with the organisation than younger volunteers
   YES [ ] NO [ ] DON'T KNOW [ ]

(d) volunteer less hours per week than younger volunteers
   YES [ ] NO [ ] DON'T KNOW [ ]

(c) require less support than younger volunteers
   YES [ ] NO [ ] DON'T KNOW [ ]

(d) require less supervision/direction/support than younger volunteers
   YES [ ] NO [ ] DON'T KNOW [ ]

(e) require less training/instruction than younger volunteers
   YES [ ] NO [ ] DON'T KNOW [ ]

(f) adapt to change more easily than younger volunteers
   YES [ ] NO [ ] DON'T KNOW [ ]
24. In your experience do volunteer-involving organisations:

(a) Cater for (provide appropriate opportunities for) older volunteers?
YES [ ] NO [ ] DON'T KNOW [ ]

(b) Discriminate against older volunteers?
YES [ ] NO [ ] DON'T KNOW [ ]

(c) Support and encourage older volunteers?
YES [ ] NO [ ] DON'T KNOW [ ]

(d) Value older volunteers?
YES [ ] NO [ ] DON'T KNOW [ ]

(e) Treat older volunteers the same as all other volunteers?
YES [ ] NO [ ] DON'T KNOW [ ]

(f) Offer opportunities for older volunteers not available elsewhere?
YES [ ] NO [ ] DON'T KNOW [ ]

Thank you - now please go to the Part D of this survey

Part C: Non-volunteers

25. I was previously a volunteer
Yes [ ] Please go to Q26
No [ ] Please go to Q27

26. I stopped volunteering because:

(a) I was unable to get there [ ]
(b) My health prevented me from continuing [ ]
(c) My personal situation prevented me from continuing [ ]
(d) I moved away [ ]
(e) Because I was asked/told to [ ]
(f) Because it was not satisfying [ ]
(g) I am not sure why I stopped volunteering [ ]

Please go to Part D
27. I have never been a volunteer because:

(a) I have never been interested [ ]
(b) I have never been asked [ ]
(c) I did not feel confident enough to volunteer [ ]
(d) I was unable to get there [ ]
(e) My health prevented me from volunteering [ ]
(f) My personal situation prevented me from volunteering [ ]
(g) I have never had time [ ]
(h) I'm not sure [ ]
(i) I have never thought about it [ ]
(j) Other (Please specify) ____________________ [ ]

Part D

This space is reserved for you to make any comments or suggestions or to raise any issues relating to older volunteers or to this survey.

Thank you for taking the time to complete this survey. Please place it in the reply paid envelope provided.

If you are interested in the outcomes from this research please keep the letter which accompanied this survey and contact me or visit the Volunteering WA website. This is just part of a long term study and results will take some time before publication.

Megan Paull
Researcher
APPENDIX C: QUALITATIVE DATA COLLECTION TOOLS

GROUP INTERVIEW FRAMEWORK

INDIVIDUAL INTERVIEW FRAMEWORK

STATEMENT OF DISCLOSURE AND INFORMED CONSENT FORMs
Conversation starters – Older volunteers

Tell me a bit about this volunteer programme you are involved in

Approximately - How many volunteers?

Who would you consider to be older volunteers? (What sort of age group?)

Approximately how many or what percentage would you consider to be "older volunteers"?

What sort of volunteer activities do they/you do?

What is the role of the volunteers vis à vis the paid workers?

How do the different age groups get on?

And what would you say about the management of older volunteers?

Do you think the organisation/manager alters their management style for older volunteers?

Tell me what you have experienced/or observed about the management of older volunteers...

(How do you think this might be different to managing other volunteers?)

What benefits do you see older volunteers bringing to the organisation?

Perhaps we can look now at the performance of older volunteers

What sort of training does the organisation offer volunteers?

Do they evaluate performance in any way? (formal/informal)

How do you know if you are performing to the standard required by the organisation? (Does it matter?)

Do you think the organisation or the manager/co-ordinator will have experienced what they might see as difficulties with older volunteers?

How was the situation managed?

How did you feel about the situation?

Would you recommend that the organisation/manager/co-ordinator manage the same situation the same way now?

Do you talk to the managers or co-ordinators about managing older volunteers?
I wonder if we can now talk about specific interactions involving older volunteers

Tell me about times you have talked to other volunteers about the role of the manager or co-ordinator?

Have you had any discussions with other volunteers about performance? Perhaps you can describe the things you talked about.

Have you had any discussions with older volunteers about ageing/decline/illness/frailty – how did you feel about those discussions? What sort of things did you talk about?

Are there any issues associated with managing older volunteers that you consider to be important that we have not really talked about - or is there something we have talked about already that you want to go back to?
Conversation starters – Managers of volunteers

Tell me a bit about your volunteer programme – especially the older volunteers

What are they like? Tell me about them.

Do you have many?

What sort of volunteer activities do they do?

What is the role of the volunteers vis a vis the paid workers? Separate? Work alongside them? ...(probes)

And what would you say about the management of older volunteers

How do you relate to them as a manager?
Is this different from the way you would manage other volunteers?
Do you alter your management style for older volunteers?

Tell me about your experience/story(ies) of managing older volunteers...

[Engage with stories and ask generative questions [how do you feel/what did you think when this happened?; What did they say then? What happened later?]

What do you think is good about having older volunteers here?
What have you learned from them?

What sort of training do you offer your volunteers?

Do you evaluate/manage their performance in any way? (formal/informal)

Are they performing well? (Does it matter?)


What happened then? What did they say? How did you manage the situation?

How did you feel about the situation?

What did you learn? Would you manage the same situation the same way now?

Do other managers have the same stories? Do you talk to other managers or co-ordinators about managing older volunteers?
I wonder if we can now talk about specific interactions with older volunteers.

Tell me about times you have talked to older volunteers themselves about the role of the manager or co-ordinator?

Have you had any discussions with older volunteers about performance? Perhaps you can describe the things you talked about.

Have you had any discussions with older volunteers about ageing/decline/illness/frailty—how did you feel about those discussions? What sort of things did you talk about?

Have you had to “retire” an older volunteer at any time?

Are there any issues associated with managing older volunteers that you consider to be important that we have not really talked about—or is there something we have talked about already that you want to go back to?
Project: Involving older volunteers: Managing performance

Researcher: Megan Paull (9310 1286)
Faculty of Business and Public Management
Edith Cowan University

I recently completed research into the use of feedback to manage the performance of volunteers and in the course of this research I identified a concern amongst volunteer managers and co-ordinators that there are times when performance decline in older volunteers can pose dilemmas for the organisation. There are some who argue that the anecdotal evidence is based on only a few incidents and that the issue is more one of age-related stereotyping. With an ageing population, volunteering is being actively promoted for seniors, both for the benefit of the community and the increase of social capital, and for the improved health and wellbeing of seniors. I am now conducting a research project to examine this sensitive area. The overall aim of my research is to develop a framework and recommendations to guide and inform practice.

What is involved?
I will be conducting group and individual interviews to gain an understanding of the experiences and perceptions of managers and of volunteers in volunteer-involving organisations.

What will happen to the data collected?
I intend to record and transcribe the interviews so that the contributions of participants are accurately captured. In the transcription process, identifying names of agencies and individuals will not be transcribed and the tapes will be erased once the final thesis is accepted by the University Research and Higher Degrees Committee. At no time will consent forms and details of participants be stored with the data collected. Data collected and transcribed will be analysed and the findings reported in my thesis, and may be used in preparing a discussion documents for publication, possibly in an academic journal or at a workshop.

Confidentiality and anonymity:
The data collected in this study will not be stored with your name, and every effort will be made to ensure anonymity. At no time will particular individuals be identified and the written report will not attribute particular statements to any organisation or individual. However due to the unique nature of some of the work undertaken by you and your organisation it may be possible for individuals to be identified by those who are familiar with them and their work.
Results:

The results of this study will form part of the thesis to be prepared for submission to fulfil the requirements for the award of the Doctor of Philosophy (Business Studies). The data collected will be analysed and cross case and comparative analysis conducted in the development of a framework to guide and inform practice. The final thesis will be placed in the library collection at the University, and it has been agreed that the Volunteering WA will also receive a copy for their library. Further, the outcomes of the study may also form the basis of other publications and research by the researcher.

Potential benefits to you and others:

By participating in this study you will contribute to the development of greater understanding of this topic. It is hoped that the final research outcomes will increase the body of knowledge on the management of volunteers, in particular older volunteers, and on the management of performance generally. Managers and supervisors of volunteers have expressed concern that this is a particularly difficult area and it is hoped that this study will assist them in this task.

If you have any concerns at any time about this research or the manner in which it is conducted please contact me on 9310 1286, Volunteering WA on 9420 7288 or the Executive Officer of the Ethics Committee at Edith Cowan University on 9273 8333.
STATEMENT OF INFORMED CONSENT

I am a participant in the __________________ (interview/group) to be conducted by Megan Paull on ____________ (date to be inserted).

I understand this forms part of the research being conducted by Megan Paull for her study on the management of older volunteers. I have read the document outlining the aims and objectives of the study and understand the arrangements made regarding confidentiality, and storage of data and results. I have been provided with a copy of this information for my own reference.

Any questions I have asked have been answered to my satisfaction.

I ____________________________ agree to participate in this activity, realising I may withdraw at any time without prejudice.

I am aware that although it is not intended to use the names of participant organisations, some of the results may allow others familiar with the organisation to identify both the organisation and the people involved.

I agree the research data gathered for this study may be published provided I am not identified by name at any time.

Participant : Date:

Investigator : Date:
APPENDIX D: ADDITIONAL RESULTS FROM PHASE ONE

This section contains data tables and figures some of which are repeated from in the body of the thesis.
Figure D.1: Respondent organisations - Organisation type

![Bar graph showing the number of respondents for different organisation types](image)

Figure D.2: Respondent organisations
Percentage of older volunteers

- not recorded: 19%
- 0-25%: 17%
- 26-50%: 15%
- 51-75%: 24%
- 76-100%: 21%
- Emergency services: 4%
- Law/Justice/Political: 4%
- Arts/Culture: 21%
- Environment: 15%
- Health: 15%
- Sport/Recreation: 17%
- Government: 17%
- Community/Welfare: 24%
- Educational/Training/Youth: 19%
Figure D.3: Age groupings of volunteers

Table D.1: Training provided to volunteers

<table>
<thead>
<tr>
<th>Volunteers receive training?</th>
<th>YES</th>
<th>NO</th>
<th>Not specified</th>
</tr>
</thead>
<tbody>
<tr>
<td>On the job</td>
<td>43 (95.6%)</td>
<td>2 (4.4%)</td>
<td></td>
</tr>
<tr>
<td>Orientation/induction</td>
<td>34 (75.6%)</td>
<td>2 (4.4%)</td>
<td>9 (20%)</td>
</tr>
<tr>
<td>Regular session</td>
<td>32 (71.1%)</td>
<td>1 (2.2%)</td>
<td>12 (26.7)</td>
</tr>
<tr>
<td>Times of change</td>
<td>24 (53.3%)</td>
<td>3 (6.7%)</td>
<td>18 (40%)</td>
</tr>
<tr>
<td>Things go wrong</td>
<td>21 (46.7%)</td>
<td>5 (11.1%)</td>
<td>19 (42.2%)</td>
</tr>
</tbody>
</table>

Table D.2: Manager experience re older volunteers

<table>
<thead>
<tr>
<th>In your experience do volunteers aged 55 and over on average:</th>
<th>YES</th>
<th>NO</th>
<th>DK</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stay less time than younger</td>
<td>41 (91.1%)</td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Volunteer less hours than younger</td>
<td>1</td>
<td>39 (86.7%)</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Require less support than younger</td>
<td>19</td>
<td>24 (53.3%)</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Require less supervision than younger</td>
<td>24 (53.3%)</td>
<td>19 (42.2%)</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Require less training than younger</td>
<td>11</td>
<td>29 (64.4%)</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Adapt to change more easily than younger</td>
<td>5</td>
<td>34 (75.6%)</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>
Table D.3: Degree of difficulty of declining performance due to age

<table>
<thead>
<tr>
<th>Degree of difficulty</th>
<th>Number of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major problem</td>
<td>2 (4.4%)</td>
</tr>
<tr>
<td>Minor problem</td>
<td>6 (13.3%)</td>
</tr>
<tr>
<td>Occasional problem</td>
<td>13 (28.9%)</td>
</tr>
<tr>
<td>Rarely a problem</td>
<td>11 (24.4%)</td>
</tr>
<tr>
<td>Not a problem at all</td>
<td>10 (22.2%)</td>
</tr>
</tbody>
</table>

**PHASE ONE – SURVEY OF OLDER PEOPLE**

Table D.4: Sample distribution for older people survey

<table>
<thead>
<tr>
<th>AGE</th>
<th>Female Metro</th>
<th>Country</th>
<th>Male Metro</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-54</td>
<td>17</td>
<td>5</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>55-59</td>
<td>24</td>
<td>9</td>
<td>13</td>
<td>3</td>
</tr>
<tr>
<td>60-64</td>
<td>26</td>
<td>19</td>
<td>10</td>
<td>25</td>
</tr>
<tr>
<td>65-69</td>
<td>25</td>
<td>18</td>
<td>28</td>
<td>18</td>
</tr>
<tr>
<td>70-74</td>
<td>24</td>
<td>15</td>
<td>23</td>
<td>15</td>
</tr>
<tr>
<td>75-79</td>
<td>21</td>
<td>8</td>
<td>32</td>
<td>14</td>
</tr>
<tr>
<td>80-84</td>
<td>16</td>
<td>4</td>
<td>12</td>
<td>4</td>
</tr>
<tr>
<td>85 +</td>
<td>16</td>
<td>6</td>
<td>16</td>
<td>6</td>
</tr>
<tr>
<td>TOTAL</td>
<td>166</td>
<td>84</td>
<td>166</td>
<td>84</td>
</tr>
</tbody>
</table>

Table D.5: Profile of respondents

<table>
<thead>
<tr>
<th>Gender</th>
<th>Female 114 (49.1%)</th>
<th>Male 97 (41.8%)</th>
<th>Unspecified 21 (9.1%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australian born</td>
<td>Yes 121 (52.2%)</td>
<td>No 107 (46.1%)</td>
<td>Unspecified 2 (0.9%)</td>
</tr>
<tr>
<td>English first language</td>
<td>Yes 206 (88.8%)</td>
<td>No 20 (8.6%)</td>
<td>Unspecified 6 (2.6%)</td>
</tr>
<tr>
<td>Active volunteer</td>
<td>Yes 164 (70.7%)</td>
<td>No 61 (26.3%)</td>
<td>Unspecified 5 (2.2%)</td>
</tr>
</tbody>
</table>
Table D.6: Respondents to older volunteer survey – gender by age group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Gender</th>
<th>Female</th>
<th>Male</th>
<th>Uns</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-54</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>55-59</td>
<td>16</td>
<td>3</td>
<td>1</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>60-64</td>
<td>17</td>
<td>23</td>
<td>2</td>
<td>42</td>
<td></td>
</tr>
<tr>
<td>65-69</td>
<td>32</td>
<td>19</td>
<td>2</td>
<td>53</td>
<td></td>
</tr>
<tr>
<td>70-74</td>
<td>17</td>
<td>21</td>
<td>5</td>
<td>43</td>
<td></td>
</tr>
<tr>
<td>75-79</td>
<td>16</td>
<td>18</td>
<td>1</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>80-84</td>
<td>3</td>
<td>5</td>
<td>4</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>85+</td>
<td>5</td>
<td>6</td>
<td>2</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Uns</td>
<td>1</td>
<td>11</td>
<td>4</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>114</td>
<td>97</td>
<td>21</td>
<td>232</td>
<td></td>
</tr>
</tbody>
</table>

Table D.7 reasons for stopping volunteering

<table>
<thead>
<tr>
<th>Reason</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable to get there</td>
<td>5</td>
</tr>
<tr>
<td>Health</td>
<td>10</td>
</tr>
<tr>
<td>Personal situation</td>
<td>16</td>
</tr>
<tr>
<td>Moved away</td>
<td>7</td>
</tr>
<tr>
<td>Asked/told to</td>
<td>1 (group closed)</td>
</tr>
<tr>
<td>Not satisfying</td>
<td>7</td>
</tr>
<tr>
<td>Not sure</td>
<td>2</td>
</tr>
</tbody>
</table>

Table D.8: Non-Volunteers - Reasons for not volunteering

<table>
<thead>
<tr>
<th>Reason</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never been interested</td>
<td>3</td>
</tr>
<tr>
<td>Never been asked</td>
<td>3</td>
</tr>
<tr>
<td>Did not feel confident enough</td>
<td>3</td>
</tr>
<tr>
<td>Unable to get there</td>
<td>1</td>
</tr>
<tr>
<td>Health</td>
<td>7</td>
</tr>
<tr>
<td>Personal situation</td>
<td>11</td>
</tr>
<tr>
<td>Never had time</td>
<td>6</td>
</tr>
<tr>
<td>Not sure</td>
<td>3</td>
</tr>
<tr>
<td>Never thought about it</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
</tr>
</tbody>
</table>
Table D.9: Volunteer responses about organisation type

<table>
<thead>
<tr>
<th>Organisation Type</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community/Welfare</td>
<td>92</td>
</tr>
<tr>
<td>Education/youth/training</td>
<td>32</td>
</tr>
<tr>
<td>Religious</td>
<td>38</td>
</tr>
<tr>
<td>Health</td>
<td>24</td>
</tr>
<tr>
<td>Sport and recreation</td>
<td>38</td>
</tr>
<tr>
<td>Other</td>
<td>69</td>
</tr>
</tbody>
</table>

Table D.10: Volunteer responses about activity type

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration/clerical/recruitment</td>
<td>64</td>
</tr>
<tr>
<td>Coaching/refereeing/judging</td>
<td>11</td>
</tr>
<tr>
<td>Performing/media production</td>
<td>20</td>
</tr>
<tr>
<td>Befriending/supporting/listening/counselling</td>
<td>59</td>
</tr>
<tr>
<td>Fundraising/sales</td>
<td>48</td>
</tr>
<tr>
<td>Preparing/serveing food</td>
<td>24</td>
</tr>
<tr>
<td>Transporting people/goods</td>
<td>37</td>
</tr>
<tr>
<td>Repairing/maintenance/gardening</td>
<td>22</td>
</tr>
<tr>
<td>Management/committee work/co-ordination</td>
<td>66</td>
</tr>
<tr>
<td>Personal care/assistance</td>
<td>21</td>
</tr>
<tr>
<td>Teaching/instruction/providing information</td>
<td>51</td>
</tr>
<tr>
<td>Other</td>
<td>39</td>
</tr>
</tbody>
</table>

Table D.11: Volunteer responses about most time devoted to activity type

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Time Devoted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration/clerical/recruitment</td>
<td>45</td>
</tr>
<tr>
<td>Coaching/refereeing/judging</td>
<td>8</td>
</tr>
<tr>
<td>Performing/media production</td>
<td>12</td>
</tr>
<tr>
<td>Befriending/supporting/listening/counselling</td>
<td>42</td>
</tr>
<tr>
<td>Fundraising/sales</td>
<td>22</td>
</tr>
<tr>
<td>Preparing/serveing food</td>
<td>10</td>
</tr>
<tr>
<td>Transporting people/goods</td>
<td>20</td>
</tr>
<tr>
<td>Repairing/maintenance/gardening</td>
<td>12</td>
</tr>
<tr>
<td>Management/committee work/co-ordination</td>
<td>43</td>
</tr>
<tr>
<td>Personal care/assistance</td>
<td>15</td>
</tr>
<tr>
<td>Teaching/instruction/providing information</td>
<td>34</td>
</tr>
<tr>
<td>Other</td>
<td>33</td>
</tr>
</tbody>
</table>
Table D.12 – Reasons for first involvement

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knew someone involved</td>
<td>33</td>
</tr>
<tr>
<td>Someone asked me</td>
<td>44</td>
</tr>
<tr>
<td>Self involvement in organisation</td>
<td>68</td>
</tr>
<tr>
<td>Saw advertisement/report in media</td>
<td>17</td>
</tr>
<tr>
<td>Found out about it myself</td>
<td>49</td>
</tr>
<tr>
<td>Other</td>
<td>20</td>
</tr>
</tbody>
</table>

Table D.13 – Current Reasons for Involvement

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal/family involvement</td>
<td>26</td>
</tr>
<tr>
<td>Personal satisfaction</td>
<td>120</td>
</tr>
<tr>
<td>Social contact</td>
<td>61</td>
</tr>
<tr>
<td>Religious beliefs</td>
<td>31</td>
</tr>
<tr>
<td>To be active</td>
<td>88</td>
</tr>
<tr>
<td>To learn new skills</td>
<td>25</td>
</tr>
<tr>
<td>To do something worthwhile</td>
<td>110</td>
</tr>
<tr>
<td>Help others/community</td>
<td>120</td>
</tr>
<tr>
<td>Gain work experience</td>
<td>2</td>
</tr>
<tr>
<td>Use skills/experience</td>
<td>71</td>
</tr>
<tr>
<td>Felt obliged</td>
<td>8</td>
</tr>
<tr>
<td>Just happened</td>
<td>12</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
</tr>
</tbody>
</table>

Table D.14: Feelings about volunteering

<table>
<thead>
<tr>
<th>Statement</th>
<th>Range</th>
<th>Mean</th>
<th>SD</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel I am doing something worthwhile</td>
<td>3</td>
<td>1.32</td>
<td>.584</td>
</tr>
<tr>
<td>I enjoy the work I do as a volunteer</td>
<td>4</td>
<td>1.28</td>
<td>.570</td>
</tr>
<tr>
<td>I worry about my ability to do the work</td>
<td>4</td>
<td>4.15</td>
<td>1.198</td>
</tr>
<tr>
<td>The work keeps my brain active</td>
<td>4</td>
<td>1.57</td>
<td>.925</td>
</tr>
<tr>
<td>I feel I am getting too old</td>
<td>4</td>
<td>4.44</td>
<td>1.007</td>
</tr>
<tr>
<td>I would like to use my skills more</td>
<td>4</td>
<td>2.58</td>
<td>1.336</td>
</tr>
<tr>
<td>I would like to have more responsibility</td>
<td>4</td>
<td>3.56</td>
<td>1.344</td>
</tr>
<tr>
<td>I find the work very interesting</td>
<td>4</td>
<td>1.59</td>
<td>.851</td>
</tr>
</tbody>
</table>
Table D.15: Expectations for 5 years time.

<table>
<thead>
<tr>
<th>Response</th>
<th>Frequency</th>
<th>% of active volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td>More</td>
<td>20</td>
<td>11.8</td>
</tr>
<tr>
<td>Less</td>
<td>33</td>
<td>19.5</td>
</tr>
<tr>
<td>Same</td>
<td>101</td>
<td>59.7</td>
</tr>
<tr>
<td>Not at all</td>
<td>14</td>
<td>0.8</td>
</tr>
<tr>
<td>Not specified</td>
<td>1</td>
<td>0.005</td>
</tr>
<tr>
<td>Total</td>
<td>169</td>
<td></td>
</tr>
</tbody>
</table>

Table D.16: Volunteer experience re volunteer-involving organisations

<table>
<thead>
<tr>
<th>Statement re older volunteers</th>
<th>Yes</th>
<th>No</th>
<th>DK</th>
<th>Sometimes</th>
<th>Neutral = 1, Sometimes = 3</th>
<th>Neutral = 1, Fairly often = 2</th>
<th>Neutral = 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cater for</td>
<td>112</td>
<td>21</td>
<td>37</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discriminate against</td>
<td>8</td>
<td>117</td>
<td>42</td>
<td>Sometimes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support and encourage</td>
<td>125</td>
<td>9</td>
<td>31</td>
<td>Neutral = 1, Sometimes = 3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value</td>
<td>130</td>
<td>7</td>
<td>28</td>
<td>Neutral = 1, Fairly often = 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Treat same</td>
<td>128</td>
<td>16</td>
<td>26</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer opportunities not elsewhere</td>
<td>68</td>
<td>25</td>
<td>75</td>
<td>Neutral = 1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table D.17: Experience re volunteers age 55 and over

<table>
<thead>
<tr>
<th>Statement</th>
<th>YES</th>
<th>NO (%)</th>
<th>DK</th>
<th>Other responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stay less time than younger</td>
<td>26</td>
<td>103 (60.9%)</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Volunteer less hours</td>
<td>6</td>
<td>123 (72.7%)</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>Require less support</td>
<td>87  (51.4%)</td>
<td>41 (24.2%)</td>
<td>40</td>
<td>1= sometimes</td>
</tr>
<tr>
<td>Require less supervision</td>
<td>100 (59.1%)</td>
<td>38 (22.4%)</td>
<td>30</td>
<td>1= sometimes</td>
</tr>
<tr>
<td>Require less training</td>
<td>74  (43.7%)</td>
<td>47</td>
<td>46</td>
<td>1= varies, 1= sometimes</td>
</tr>
<tr>
<td>Adapt to change more easily</td>
<td>57</td>
<td>64 (33.7%)</td>
<td>47</td>
<td>1= “varies”</td>
</tr>
</tbody>
</table>
**COMPARATIVE DATA FROM BOTH SURVEYS**

Table D.18: Combination of organisation and active volunteer responses on experience with older volunteers

<table>
<thead>
<tr>
<th>Statement</th>
<th>Organisation responses</th>
<th>Active volunteer responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>In your experience do volunteers aged 55 and over on average:</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Stay less time than younger</td>
<td>41 (91.1%)</td>
<td>2</td>
</tr>
<tr>
<td>Volunteer less hours than younger</td>
<td>1</td>
<td>39 (86.7%)</td>
</tr>
<tr>
<td>Require less support than younger</td>
<td>19</td>
<td>24 (53.3%)</td>
</tr>
<tr>
<td>Require less supervision than younger</td>
<td>24 (53.3%)</td>
<td>19 (42.2%)</td>
</tr>
<tr>
<td>Require less training than younger</td>
<td>11</td>
<td>29 (64.4%)</td>
</tr>
<tr>
<td>Adapt to change more easily than younger</td>
<td>5</td>
<td>34 (75.6%)</td>
</tr>
</tbody>
</table>
### Table D.19: Free response data examples from coding.

<table>
<thead>
<tr>
<th>Node</th>
<th>Code</th>
<th>Volunteer response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health/frailty</td>
<td>Health concerns</td>
<td>Older volunteers have hearing and vision difficulties hence they must be spoken to slowly and clearly. Inability to fully understand because many people talk too fast. (V)</td>
</tr>
<tr>
<td>Training</td>
<td>Training</td>
<td>Organisations usually have their own methods of training. Hopefully there is a clear understanding of rights and obligations for the volunteer by the organisation (V)</td>
</tr>
<tr>
<td>Assumptions</td>
<td>Assumptions about abilities</td>
<td>Older person are often NOT valued in a community and have to push into some areas eg - I can't be volley fire fighter any more but by doing books etc I can release a fit person to do the main job! (V)</td>
</tr>
<tr>
<td>Attributes of older volunteers</td>
<td>Attributes of older volunteers</td>
<td>I find older volunteers more sincere, more patient, caring, willing and more fun loving. (V)</td>
</tr>
<tr>
<td>Attributes of older volunteers</td>
<td>Value of skills and experience</td>
<td>Some older volunteers are a pleasure to work with, especially these who are asked to do things they have never done before but are keen and anxious to learn. Others are keen to share their knowledge and update their skills (V)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>I am inclined to resent the fact that others want my expertise and service for no fee, just because I am old! (V)</td>
</tr>
<tr>
<td>Concerns</td>
<td>Financial barriers</td>
<td>Don’t want regular commitment without financial return and volunteering costs money in various ways, which I cannot afford to outlay. (V)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Some volunteers find that their “out-of-pocket” expenses are greater than they anticipated or were led to believe, at time of volunteering. These expenses could be a factor in many “older” volunteers not volunteering (V).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Where volunteer is on a pension $ funds are limited I think that the organisation should help to pay for the expenses. Eg RSPCA volunteers have to pay for Police Clearance $41</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tetanus injection $Doctors fee Wellington boots (V)</td>
</tr>
<tr>
<td>Concerns</td>
<td>Mobility barriers</td>
<td>If they don’t drive a vehicle, transport is a big problem for older volunteers. (V)</td>
</tr>
</tbody>
</table>
| Concerns about generational differences – (became succession) | Concern about younger generation not volunteering | As answers to your questions show, the biggest % of volunteers are in the “aged” group, and a lot of us are getting beyond it! Then what happens? One would like to think that the “baby boomers” will take over, as they too, get older. But I have my doubts. They are a different lot. We oldies grew up mucking do, helping neighbors [sic], worked at bazzars [sic], cake stalls, raffles and God knows what to keep schools, churches etc going. The younger ones - usually- have everything, so why doesn’t everyone else? Admitably [sic] they work hard, usually both husbands and wives (so that
<table>
<thead>
<tr>
<th>Concerns about generational differences – (became succession)</th>
<th>Concern about attitudes of younger generation</th>
<th>Young ones aren’t interested unless they are paid and don’t really care about the job in hand. Once the job is done, they don’t think of it till they go again. The oldies will willingly help in any way no matter what. If they can’t help will find someone who will. The oldies are the backbone of a community. (V)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concerns about generational differences – (became succession)</td>
<td>Succession concerns/generational</td>
<td>There is also a tendency for them to not step aside for younger people to take over. (V)</td>
</tr>
<tr>
<td>Concerns about generational differences – (became succession)</td>
<td>Prejudice towards younger</td>
<td>Some older volunteers want to run the show/organisation/club simply because they are older, and resent younger – and usually more experienced members telling them what to do. (V)</td>
</tr>
<tr>
<td>Fears and concerns</td>
<td>concerned about commitment</td>
<td>I don’t want to be “tied down” after working for 20 odd years. (V)</td>
</tr>
<tr>
<td>Fears and concerns</td>
<td>Adaptability to change</td>
<td>“We’ve always done it this way” is often the cry of some older volunteers when new ways/methods etc are suggested. (V)</td>
</tr>
<tr>
<td>Fears and concerns</td>
<td>Computing fears</td>
<td>The emphasis on using computers is “off-putting” to many older volunteers. In one organisation of which I am on the committee, the young secretary uses her laptop for the minutes. There is some feeling about “not keeping up”, but does not worry me as I also use a computer. (V)</td>
</tr>
<tr>
<td>Insurance</td>
<td>insurance</td>
<td>Care/sound appraisal needed in engaging older volunteers. They may be beyond coping with the position mentally. – also not well balanced on their feet. – insurance risk. (V)</td>
</tr>
</tbody>
</table>
APPENDIX E: ETHICAL CONSIDERATIONS
NOTES ON ETHICAL CONSIDERATIONS

All research undertaken is subject to approval by the University Ethics Committee.

Several ethical considerations arose in relation to this study.

Confidentiality of Records

Records are required by the University to be preserved for a minimum of five (5) years. Confidentiality of records has been maintained during the study by storing tapes and transcripts separately from consent forms at my home. After the study is completed, tapes will be erased and consent forms destroyed by shredding, thus leaving only the transcripts to be stored for the remainder of the five years.

Transcription was undertaken by a third party, the transcriber, who did not have access to names of participants and was required to sign a confidentiality agreement prior to undertaking the work. Transcripts do not identify agencies or participants by name even where this was included in discussion by participants.

Participants were advised that although it is not intended to use the names of participant organisations, some of the results may allow others familiar with the organisation to identify both the organisation and the people involved. General descriptors have been used to identify the organisations under discussion. Consent forms were collected from participants and a copy of one of these is included in Appendix C. In keeping with this undertaking I have included a sealed section in this thesis. The section will be removed from publicly available copies of the thesis, to avoid embarrassment or regret being experienced by the individuals concerned should they believe that they have recognised themselves.

Embarrassment or Regret

At times participants discussed difficult situations which have arisen with senior volunteers and which are emotional situations or about which they have regrets. The area is a sensitive one and every effort was made to handle this with tact and care. Participants were asked not to refer to particular people or organisations by name. No participant expressed a need for follow up advice for a particular situation.
Vulnerable Populations

Discussions of the problems and issues arising for volunteers and for volunteer managers and co-ordinators included discussion of:

- persons with an intellectual or mental impairment
- persons highly dependent on medical care
- persons in dependent or unequal relationships
- Aboriginal and Torres Strait Islander peoples.
- Persons from a Culturally and Linguistically Diverse (CALD) or Non-English Speaking Background (NESB) or with language difficulties.

The nature of volunteer work, some of which may be in Human Services or related fields, or the nature of the problems being experienced by individual volunteers meant that discussions with volunteers and with volunteer managers at times related to members of vulnerable populations. Further, discussions at times involved information which may be considered to be private. Every care has been taken to ensure the anonymity of persons involved in discussions, and to avoid the identification of people or organisations about whom discussions took place. Participants were be informed of their right to withdraw from the study at any time.

The intellectual property of all individuals participating in the study was taken into consideration and due acknowledgement of all sources included where this is possible. Information which will identify an agency or a person has been indirectly reported and identifying information removed to reduce the chances of the participant or the agency being identified. The removal of the scaled section in publicly available copies is designed to reduce the possibility of confidentiality being breached.
APPENDIX F: FOLD OUT COPIES OF FIGURES
Figure 3.1: Initial Research Method Framework
**Interpretivist Paradigm**
(Copied from Gioia & Pitre, 1990)

**STEPS TOWARDS THEORY BUILDING**

Opening work
SELECTING A TOPIC
What are the issues?
What are the research questions?

DESIGNING RESEARCH
What are data?
Where to find data?
How to measure data?

Data collection
IDENTIFYING SPECIFIC CASES
QUESTIONING INFORMANTS
According to what is relevant to them in context

Analysis
CODING
Provide a description at first and something second level of abstraction
FORMULATING CONJECTURES
Identify the relations between concepts at first level or across levels of formulation
EVALUATING CONJECTURES
Validate with informants through new data collection
FORMULATING THEORY
Identify the emerging concepts and relationships

REVIEWING LITERATURE
Identify what was already known

Theory building
WRITING UP A SUBSTANTIVE THEORY
Show how it all fits together

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**Parallel commentary on variations for this thesis**

Issues, questions arise from previous research conducted in positivist paradigm.

Previous research, researcher familiarity with field and literature review established lack of research of subjective in-depth nature, plus lack of contextual data in Western Australia.

**Phase One: Seeking contextual data**

Lack of contextual data - survey questionnaire format informs next stage. Development of questionnaire data includes opportunity for respondents to add free response data.

Descriptive and thematic analysis
Sampling - asking those who are likely to know

**Phase Two: In-depth Interview data**

Framework established using data from Phase One and literature review.

Sampling - next organisation selected based on initial data analysis

Data analysis undertaken using:
- Constant comparison
- Saturation
- Theory building uses
- Abductive approach

Link to existing literature

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Figure 3.2A: Gioia and Pitre's phases of data collection within the interpretivist paradigm

Figure 3.2B: Commentary on phases of data collection for this thesis
Figure 3.5: Final research methodology
Figure 6.1: Mapping of volunteer responses from the data

Figure 6.2: Mapping of manager responses from the data
Figure 6.3A: Theorising about manager sensemaking – Complex depiction

Figure 6.3B: Theorising about manager sensemaking – Linear depiction