

Valuing older workers in the voluntary sector

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Abstract

Purpose – This paper reports on research into the employment of older workers, paid and unpaid, in the voluntary sector. It draws on six case studies which were the research focus. The research was designed to test the hypothesis that the voluntary sector has been in the forefront of utilising the knowledge, skills and talents of older workers and to draw out practical guidance for other organisations in this and other sectors.

Design/methodology/approach – The author consulted over 30 people with a known interest in older workforce issues and/or employment in the voluntary sector and, from these discussions, identified six organisations to be the subject of structured telephone interviews. The interviewees were all at chief executive or senior management level.

Findings – The research confirmed that older workers, whether they are paid employees or volunteers, are of great value to the voluntary sector. This is because of their life experience and skills and, particularly in the case of volunteers, their availability and flexibility. The six organisations on which the research focused provided excellent examples of good practice. However, this does not generally involve employment policies and practices with a specific focus on older workers but, rather, policies and practices which embrace older workers.

Originality/value – Earlier research has usually focused on the private and public sectors. South East England Forum on Ageing wanted this project to focus specifically on the voluntary sector and this decision was vindicated by the fact that, in searching the literature and discussions with authorities, the author did not identify previous research on older workers specifically focused on this sector.

Keywords Older workers, Older volunteers, Voluntary organizations, Policies and practices, Life experience and skills, Recruitment and flexible employment, Elderly people

Paper type Research paper

Background and purpose of research

The South East England Forum on Ageing (SEEFA) brings together representatives of older people and organisations working with older people. Its mission is: *Making the South East work for older people – now and in the future*. SEEFA has a recognised track record of interest in older workforce issues based on the South East's 40-70 Tomorrow's Workforce programme, which influenced the content of the national 50+ Works guidance for organisations (developed by The Age and Employment Network) contracted to the Department for Work and Pensions, and was described in the author's earlier paper (Wilson, 2010).

The purpose of this new project was to identify, research and report on voluntary sector effective practice in capitalising on the knowledge, skills and talents of older workers (paid and unpaid).

Previous research has provided ample evidence that work, or more specifically good work, is good for people's health and well-being. Demographic changes mean that employers will increasingly need to rely on recruiting and retaining workers over the age of 50, while increased longevity and pension challenges mean that many older people will want to, or have to, work longer.

These changes mean that employers will need to become more flexible and open minded about whom they recruit. They will also need to improve their approaches to employee retention,

including re-skilling opportunities and more flexible working patterns, with support for older employees to consider different options if they want to move into alternative work or if they need, for example, to care for elderly relatives.

Other research has usually focused on the private and public sectors. SEEFA wanted this project to focus specifically on the voluntary sector, in which some organisations reputedly have been in the forefront of utilising the knowledge, skills and talents of older workers. The project was intended to test this hypothesis and, assuming it was shown to be true, to draw out key lessons from existing examples of effective practice.

SEEFA's aim is to disseminate these lessons within the voluntary sector itself and, so far as it is relevant, within the private and public sectors. Previous South East experience has been contributing to the work of two national Age Action Alliance groups focused on employment. SEEFA hopes that the outputs from this new research will be of value nationally as well as to South East partners.

Research methodology

Extensive consultation was undertaken to identify a short-list of voluntary sector organisations considered to have “age-friendly” policies and practices. This process was protracted as the 30 or so authorities whom the author consulted, while agreeing that good practice existed in the sector, had difficulty in identifying specific organisations with thought-through and reportable policies and practices.

However, the following six organisations, of very different kinds and size were successfully identified:

- The Children's Trust;
- CSV's LifeLines project;
- Samaritans;
- 3VA (a local Council for Voluntary Services);
- VTCT (an educational charity); and
- Women's Pioneer Housing.

Structured telephone interviews were conducted with senior staff in these organisations. Individual case studies about each of the six organisations make up most of the research report, together with two effective practice “checklists” relating to the employment of older workers, both paid and unpaid, and relating to volunteers in particular. The points from these checklists have been organised thematically in this paper under the generic heading Implications for practice. Each thematic section of the paper begins by drawing out some key findings from the individual case studies.

Organisational culture

3VA's policies and practices are “age blind” but around half of the paid employees are over the age of 50, as compared with one-fifth who are under 30. Its chief executive attributes this age profile, and the ability to attract valuable older recruits, to:

- a wide recruitment net and a real openness to recruiting people of whatever age (in contrast with some practice in the private sector);
- the nature of the work and the need for significant levels of expertise and experience for many roles; and
- flexible and supportive employment practices (including willingness to make adjustments for disabled people).

The Children's Trust has recently refreshed its values in partnership with its employees, identifying the following as being an essential part of working at the Trust: child and family focused, professional, caring and supportive, fun, can do, collaborative. The Trust's maintenance

department employs a high proportion of older staff who have identified, amongst others, the following benefits of working for the Trust: attractive location and environment, working for a good cause, job stability, flexible working, being trusted by management and being respected for their expertise. The Trust recently carried out a tree planting ceremony in celebration of long-serving staff across the Trust at which its chief executive said:

The Trust emphatically values long service. Your collective wisdom and experience are extremely important. Seeing things in a historical perspective can help us understand better who we are and what we are capable of.

Samaritans volunteers embrace the unified ethos of “one strategy, one service for one general population” while, at the same time, identifying strongly with their local centres and communities which engender great feelings of “camaraderie” and of “being part of a family”. While some volunteers stay for two-five years, many stay for much longer, so that working with Samaritans “often becomes part of volunteers’ lives”. On this basis, and with the general extension of people’s working lives, the chief executive expects the average age of the volunteer workforce to increase over time.

Women’s Pioneer Housing prides itself on having an “open minded” approach to managing its workforce, including giving all its employees the right to apply for flexible working. The chief executive says that competing with larger housing associations, which can offer more obvious variety and opportunities for advancement, “makes our open minded approach a key factor in making our organisation good to work for”. However, the chief executive also points out that, while good employment practices help achieve high staff retention rates, this can be a mixed blessing for a smaller organisation if they stop it “refreshing itself” through recruiting new people (of whatever age) with different experience and fresh ideas. She sees the removal of the Default Retirement Age as a challenge to organisations to address the age balance of their workforces and to sharpen up their performance review arrangements.

Implications for practice

- Make sure your organisation’s values, policies and practices are open, inclusive and empowering and that they recognise the value of older workers, whether they are paid employees or volunteers.
- Celebrate the contributions of older and longer serving staff, whether they are paid or volunteers.
- As low staff turnover can be a mixed blessing if it stops an organisation refreshing itself, see loss of the Default Retirement Age as a trigger to review the age balance of your organisation and to check whether performance review and capability arrangements need sharpening up.

Open recruitment practices

Job vacancies at 3VA are advertised widely, including through its comprehensive database of local organisations. Shortlisting is done on an anonymous basis, excluding age and other personal characteristics. Hand-written applications are accepted and, although most roles do require ICT skills, training is available for this. The chief executive emphasises the importance of wide recruitment net and a real openness to recruiting people of whatever age (in contrast with some practice in the private sector).

At VTCT, there are no age limits on job applicants (the organisation recently appointed a 58 year old) and a variety of advertising routes are employed. Application forms do not include age details. Sifting and shortlisting procedures exclude names, age, gender, etc. The organisation avoids imposing excessive requirements for prior ICT skills.

The CSV LifeLines project benefits from Community Service Volunteers’ national employment policies and what the Lifelines manager describes as its “open and inclusive ethos”. Recruitment is designed to reach people of all ages and backgrounds. When recruiting, the manager recommends using a range of ways of attracting people but particularly word of mouth through existing volunteers and members of activity groups.

At Samaritans, the nature of the work (supporting people contemplating suicide) means that “resilience” is an essential requirement for the main volunteer roles, and recruitment criteria place a strong emphasis on candidates’ life skills.

Implications for practice

- Ensure you have a wide recruitment net to reach people of all ages and backgrounds, utilising databases of local organisations, networks of volunteers and the power of “word of mouth”.
- Embrace and demonstrate a real openness to recruiting people of whatever age, while recognising how people’s life experience can make them particularly suitable for particular roles.
- Operate recruitment practices with no age limits and which are “age blind”, e.g. accepting hand-written applications and excluding people’s names, ages and other characteristics during short-listing.
- Avoid undue requirements for existing IT skills and be prepared to offer training and mentoring support (e.g. from younger employees) for those who are willing to update or acquire new IT skills).

Flexible employment policies

Until the 2007 legislative change on flexible working, Women’s Pioneer Housing had worked within the legal requirements by responding only to the requests of parents of young children. When the provision was extended, it decided to extend the right to apply to all staff. This was for two reasons:

- There were some staff who were not carers of adult relatives in the sense of looking after their daily needs, but nonetheless had serious family responsibilities, and they were not covered by the legislation.
- Once a decision had been made to extend to this group, it seemed unreasonable to assume that family responsibility was the only compelling reason to wish to change working arrangements. Wanting to prepare for retirement or make serious commitment to study or voluntary work were no less important to some other employees, and given that the organisation always wants to ensure its decisions make good business sense, it saw no reason not to take applications from anyone.

The organisation particularly had in mind situations where (usually older) employees had caring responsibilities for elderly dependents, perhaps at a distance from London or overseas and where these staff were trying to manage the situation by dipping into their annual leave, with implications for their own stress levels and for operational performance. In practice, being open minded about who might apply has led to flexible working arrangements being agreed for some older employees for different reasons – e.g., to change their work-life balance, reduce the wear and tear of daily commuting or prepare for complete career change. The chief executive emphasises that, as a corollary of being open minded, it is important to be clear about business demands and to be prepared to put limits on flexible working where it might impede organisational effectiveness.

Similarly, the Children’s Trust’s approach to flexible working extends to all employees and the Trust aims to accommodate the needs of older workers who may have increasing caring responsibilities for elderly relatives. Consideration is given to accommodating requests for time off for hospital visits and arrangements for emergency and compassionate leave.

At 3VA, many of the paid staff are part-time, there are opportunities to work from home and staff can take leave for compassionate reasons or for family care. As a result staff turnover is low.

Previously, VTCT had a policy of enabling people “running down” towards retirement to move on to flexible hours but now there is a general presumption in favour of flexible hours for employees of all ages, if the employee wants this and it is not against VTCT’s business interests.

Implications for practice

- As with parents of young families, be aware of older people's caring responsibilities for elderly relatives which may increase over time, affecting stress levels and work effectiveness.
- Give people of all ages the opportunity to apply for flexible working options such as part-time working, flexi-time and remote working, including working from home.
- Be prepared to grant special leave for hospital visits and other emergency caring responsibilities, particularly when dependents live far away.
- Be willing to consider changes in working arrangements to help people prepare for retirement, to increase their commitment to study or voluntary work, or otherwise to change their work-life balance.
- On the other hand, be clear with staff about the need to put limits on flexible working where this might impede organisational effectiveness, and spell out what those limits are likely to be.

Effective management

The Children's Trust has redesigned its Performance and Development Review system to be simple and straightforward and to emphasise the importance not only of what people do, but also how they do it, in order to embed the values of the organisation. It therefore provides a sound basis for addressing performance issues at whatever age.

At VTCT, there is no expectation of retirement at any particular age. The organisation has a rigorous system of regular performance reviews, and capability procedures, which have recently been reviewed and revised by the head of Human Resources. Each member of staff is required to have one developmental goal relating to their longer term career goals and this provides a basis for dialogue between managers and older staff about the latter's intentions as regards continued employment. Managers are encouraged to avoid making assumptions about people's career plans and ambitions but will, where necessary, challenge younger staff who need to "raise their aspirations" or older staff who have become "stale" in carrying out their roles and responsibilities.

At 3VA, annual appraisals include looking a few years ahead. There is no expected retirement age but, where someone is approaching the state pension age, their own and the organisation's future needs are reviewed. There is a formal capability procedure but in practice this has not needed to be used. Where project staff are on time-limited contracts, the annual appraisal process is used to review alternative employment options.

Alongside formal performance review, staff at Women's Pioneer Housing are encouraged to review their longer term career options. The chief executive sees this as helpful to the organisation for workforce planning purposes but also to individual employees, particularly in addressing the implications of having to work longer before becoming eligible for the state pension. And, with the fast-moving context for the organisation's work, she sees a need to challenge employees of all ages (myself included) to be ready to update and acquire new skills.

Implications for practice

- Use performance reviews as an opportunity for people to consider their long-term plans, the implications of having to work longer before reaching the state retirement age and the need to update their skills.
- For people on time-limited contracts (e.g. project staff) use performance reviews to consider alternative employment options.

- Require staff of all ages to have at least one developmental goal and use this for a dialogue between managers and older staff about the latter's intentions as regards continued employment beyond the state pension age.
- Avoid making assumptions about people's plans and ambitions and be prepared to challenge younger staff who need to raise their aspirations, or older staff who are no longer carrying out their roles effectively.

Training for staff and managers

At VTCT, employees of whatever age go on relevant customer services training and management training: the chief executive describes this as “an expectation rather than an offer”. Similarly, ICT updating is a general requirement and the organisation has found that the European Computer Driving Licence provides a flexible framework to accommodate people with different learning speeds. ICT Champions are used to support staff to improve their skills.

The Children's Trust's recruitment and management training includes a focus on avoiding age and other kinds of bias. Staff of all ages are expected to participate in its training and development programme, including its policy of “growing our own” specialist staff. All paid employees and volunteers are expected to have personal training plans and training is organised so that part-time staff are able to take part. The Trust is currently reviewing its coaching for managers and will be considering the handling of later age issues as part of this review.

Implications for practice

- Make relevant training at all ages “an expectation rather than an offer”, with all staff having a personal training plan and with training organised so that it is accessible for staff working part-time or at home.
- Ensure recruitment and management training includes a focus on avoiding age and other kinds of bias.
- Ensure that management training and coaching includes a focus on the handling of later age issues.

Working with volunteers

Against just under 100 paid employees at its headquarters, Samaritans has around 20,665 volunteers at its centres and in prisons: a ratio of 1:205. Samaritans volunteers are recruited locally but using standardised procedures and recruitment literature. Samaritans also operates active retention policies. Recognising the mobility of the population from which volunteers come, Samaritans has recently introduced a system of “passporting” to other local centres when volunteers and their families move to other parts of the country. Also, the standard shift pattern of four sessions per month can be flexed over longer periods of, say, three months (making it easier, e.g. for teachers to volunteer). Each volunteer receives at least five hours of “On-going Training” each year and there are extensive mentoring arrangements. There is an emphasis on supporting volunteers to systematically build on their experience through a system of debriefing after every shift. There are opportunities to move up into “senior volunteer” managerial roles in a three-year rotation system, with people normally standing down again after their three-year stint. A combination of these factors means that, while previously recruitment was just about keeping up with turnover, there has been a 9 per cent net increase in active listening volunteer numbers over the past five years. As with paid employees, there is no expected “retirement age” for volunteers. However, the organisation has capability procedures in place to deal with situations where volunteers, of whatever age, are not meeting the standards for the service. These procedures deliberately adopt a supportive “problem solving” approach, including mediation and mentoring, but with the potential for volunteers to be dismissed in the last resort.

On a much smaller scale, CSV's LifeLines project also has many more volunteers than paid staff – currently 46 volunteers involved in projects and 51 knitters: a volunteer/paid ratio of around 20:1. CSV's LifeLines “celebrates and values older people”. Most volunteers are in their

50s and 60s but some are in their 80s and 90s. For specific volunteer positions, such as one-to-one support, roles are clearly specified in advance. However, for activities in the community, volunteers are invited to consider what they would like to contribute based on their interests, experience and skills. In this way, volunteers are encouraged to “design and develop their roles over time”. For example, two volunteers had the idea of setting up a memory group a couple of years ago and have since developed their own facilitation methods in which they now train other volunteer group leaders.

In a 3VA project with the fire and rescue services, involving 60 volunteers, there was a greater than usual proportion of men and of younger people – reflecting the focus and image of the work. This has caused the organisation to consider how it might focus its recruitment efforts so as to encourage more younger people to volunteer for other roles.

Implications for practice

- Follow the recruitment and management principles applying to paid staff but in ways that recognise the differences in the relationship with volunteers, keeping processes and paperwork to the necessary minimum.
- Have clear volunteering policies and guidelines, write them down and share them.
- When recruiting, understand the things which affect someone’s ability to volunteer, whether arising from age or from other factors, e.g. transport issues, financial constraints, ergonomic requirements.
- Role descriptions: for most roles (i.e. except where the specific intention is for the volunteer to design and develop an activity) be absolutely clear about, and write down, what volunteers will be expected to do.
- Select for the requirements of the role: for example, if resilience and evidence of life experience are essential, recruit against these criteria even if that means an imperfect age, gender or ethnic balance.
- When volunteers are being asked to design and develop community activities, support them to do so based on their interests, skills and experience and to further develop their activities over time.
- Provide structured support in the form of induction, essential (“light touch”) procedures, guidance on the “boundaries” of appropriate behaviour and training which responds to volunteers’ needs.
- Provide appropriate training, and support volunteers to systematically build on their skills and experience.
- Ensure a “sufficient critical mass” of volunteers to avoid placing too great a burden on an individual volunteer.
- If a volunteer’s ability to perform a role diminishes, adopt a supportive, problem solving approach including mentoring, mediation and, where appropriate, guiding people into alternative roles.
- Ensure that your procedures do provide for dismissal in the last resort where a volunteer is no longer performing effectively after the provision of guidance, mentoring and other support.

Conclusions

Researching the six organisations confirmed that older workers, whether they are paid employees or volunteers, are of great value to the voluntary sector. This is because of their life experience and skills and, particularly in the case of volunteers, their availability and flexibility. It is not generally translated into employment policies and practices with a specific focus on older workers but, rather, into policies and practices which embrace them.

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