



Government of South Australia

Department for Families  
and Communities

Department for Families  
and Communities

Volunteers Unit



# Engaging older volunteers project

Research report

July 2007

## FOREWORD

The fabric of our community is made up of the inextricable links between paid and voluntary activity. Older people are an essential component of both the paid and unpaid effort in our community - especially in South Australia, the state with the most rapidly ageing population in Australia. The balance of paid and unpaid activities, and the contribution of older people to the sustainability of community effort is rapidly changing and it is essential that we recognise and understand these changes and the resulting impacts on society.

The Engaging Older Volunteers project explores some of the emerging issues related to changing community needs and a changing population profile in South Australia.

The project acknowledges that older people already contribute significantly to volunteering in our community, but more importantly it forecasts that the demand for this contribution will increase. The project also acknowledges that the capacity for the older cohort to respond to this increased demand is also anticipated to increase, due to the profile of the emerging generation of retirees – more educated, more skilled and longer living than earlier generations of retirees.

The Engaging Older Volunteers project is aligned to target 5.6 in South Australia's Strategic Plan ie. *Maintain the high level of volunteering in South Australia at 50% participation rate or higher.* It is widely documented however, that the act of volunteering contributes to increased health, reduced crime and greater community capacity – so in many ways this project contributes to a broad range of South Australia's Strategic Plan targets.

We commend to you the three components of the Engaging Older Volunteers project. The research, the promotional materials and the insights into older volunteers and emergency recovery offered by the project all contribute to the significant information, discussion and debate critical to the issues around volunteering which are presently confronting us and are likely to do so in ever increasing magnitude.



Stephen Blight  
Director  
Volunteers



Anne Gale  
Director  
Office for the Ageing

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## TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY</b>	<b>1</b>
Key points	1
Inclusivity in volunteering	1
Influencing mature age people to volunteer	2
Short term volunteering	2
Project management	2
Recommendations	3
<b>PART 1</b>	<b>7</b>
Introduction	7
The aim of the project	7
Significance of voluntary activity by older people	7
Defining volunteering	8
Context of the project: the current situation in Australia	9
Demographic determinants of volunteering	9
The national context	10
Mutual obligation in Australia	10
The state context	11
Partners in volunteering in South Australia	13
Volunteering SA	13
Funded non-government organisations (NGOs)	13
Healthy volunteers, healthy economy	13
Volunteerism as a feature of citizenship	14
<b>PART 2</b>	<b>17</b>
<b>Influencing mature age people to volunteer</b>	<b>17</b>
Attracting the interest of the target group	17
Brainstorming	17
Print	18
Electronic media	18
Local press and radio	18
Short term volunteering within DFC	19
Grey nomads as volunteers	19
Existing research on grey nomad potential	19
Discussion of project outputs	21

<b>PART 3</b>	<b>23</b>
<b>Management of the project</b>	<b>23</b>
Background	23
Scope	23
Project governance	23
The Steering Committee	24
<i>Role and purpose</i>	24
<i>Membership</i>	24
<i>Meetings</i>	24
<i>Duration</i>	24
The Reference Group	24
<i>Role and purpose</i>	24
<i>Membership</i>	25
<i>Meetings</i>	25
<i>Duration</i>	25
Involvement of the target group	25
Diversity	25
Outputs	26
<i>Output 1</i>	26
<i>Output 2</i>	26
<i>Output 3</i>	26
Project method	26
<b>Conclusion</b>	<b>27</b>
<b>Acknowledgements</b>	<b>29</b>
<b>Bibliography</b>	<b>31</b>



## EXECUTIVE SUMMARY

This project has considered the issue of the expected need to increase the level of volunteering with the Department for Families and Communities (DFC) and its funded organisations in response to:

- possible increased demand for services across and
- the broad implications of the ageing of the population.

The primary factors influencing the immediacy of this project relate to the health and wellbeing benefits to volunteers, and to the value-adding to services afforded by volunteer input.

Baby boomers – the generation of Australians born in the years between the end of the Second World War and the mid 1960s – are now approaching the age which has generally been regarded as the traditional retirement age. The implications of this demographic imperative include a greater number of older people in the community and an increased demand for social services. It also implies a potential availability of recent retirees, or those reducing their paid work and making the transition to retirement, as volunteers. DFC has signalled an interest in attracting this cohort of potential volunteers through the commissioning of the Engaging Older Volunteers (EOV) project, the outputs of which are:

- a research report on the project, which will contribute to DFC workforce planning (this paper)
- a brochure offering suggestions on recruitment of older volunteers and suite of supporting promotional resources
- a short report relating to the potential involvement of mature age people as volunteers on an episodic basis in emergency recovery operations.

With the projected rise in the numbers of people aged 65 years and over in the next fifteen years, it is particularly important that South Australia harnesses the beneficial effects of volunteering for its population, which is now the oldest in Australia. Value-adding to human services delivery in general, and DFC in particular, is reliant upon volunteering, since roles such as social support and friendly visiting tend to fall outside the parameters of mainstream service provision.

### Key points

#### Inclusivity in volunteering

Literature from overseas (Okun: 1993; Oman et al: 1999; Musick et al: 2003) and more recently Australia (Onyx and Warburton: 2003) relating to ageing and volunteering consistently refers to a positive relationship between productive ageing and volunteering.

In addition to reported improvements in psychological and physical health there is evidence that, through contributing to relationships of social inclusion, volunteering contributes to the development of social capital (Putnam: 2000) and may be considered to represent a component of citizenship in a civil society (Craig: 2004).

Inclusive responses to volunteer recruitment are therefore critical to recruitment strategies adopted by DFC, and since groups of people such as culturally and linguistically diverse (CALD) populations and Aboriginal and Torres Strait Islander

(ATSI) populations have traditionally been under-represented in formal volunteering (defined as occurring within an agency), these groups were intended to constitute a particular focus of this report.

Whilst it has been possible to identify ways of engaging the CALD community, via the project Reference Group, it proved more difficult to identify strategies to engage the ATSI population. Information from the project Reference Group indicates that volunteering within an organisation such as DFC - as opposed to within the extended family and ethnic or geographically local community - may be a Eurocentric concept that is not readily embraced by ATSI communities. Furthermore, socio-economic disadvantage is not generally associated with a propensity towards volunteerism. This topic has been explored by Kerr et al (2001) with similar conclusions. Recognition of the community helping and caring roles undertaken by ATSI and CALD populations within their own communities should be acknowledged for the positive impact on individuals, families and situations in which DFC might be involved, and upon ATSI and CALD communities more generally.

A detailed exposition of the relative advantages and disadvantages to ATSI people of encouraging their increased participation in government sponsored volunteering opportunities is beyond the scope of this paper and relies upon further research on the topic.

### **Influencing mature age people to volunteer**

The most significant recruitment tool for volunteering is generally accepted to be word of mouth. A satisfied pool of volunteers will almost certainly 'spread the word' and hence stimulate an interest in volunteering and attract new recruits. Whilst highly effective in terms of raising the numbers of volunteers, this process has the potential to lead to homogeneity of the volunteer team. Diversity is important in relation to inclusive recruitment and employment practices and in terms of responding to a community that is culturally, linguistically and in many other ways diverse. Additional approaches to recruitment are therefore useful, including use of electronic and print media.

### **Short term volunteering**

Short term volunteering has received a raised profile in Australia as growing numbers of mature age and retired adults adopt a travelling life style and are prepared to undertake short term volunteering as they travel.

Mainstream and regular volunteering within DFC is not the most appropriate form of involvement for mature age people who are travelling, since the nature of the work tends to rely upon relationship building. Therefore, the current project discusses recruitment strategies relating to short term volunteering for mature age people within the context of DFC initiatives associated with emergency recovery following a state disaster.

### **Project management**

Project governance was achieved via a Steering Committee and Reference Group. Representation on these groups was identified on the basis of their stake in the project in the former, and in the latter, the ability to represent the position of the target groups – CALD, ATSI, mature age people and volunteers. Communication was via face to face meetings, telephone contact and e-mail updates. Drafts of project outputs were tendered to both governance bodies for comment and reviewed accordingly prior to finalising.

## Recommendations

### **1. Promoting volunteering**

It is recommended that volunteering by mature age adults with DFC is promoted extensively by a campaign which:

- focuses on increasing volunteer satisfaction in order to retain existing volunteers and to promote the advantages to others by word of mouth, a highly successful recruiting technique
- enhances and extends recognition strategies in order to highlight the achievements of individuals and the benefits of volunteering within DFC
- contains regular promotion of volunteering on ethnic radio which is particularly effective in reaching mature age CALD communities
- uses events such as National Volunteers Week (NVW) to trigger a focus on promoting volunteering in DFC, using radio, internet and NVW events
- uses colourful, attractive and accessible DFC internet pages to attract potential volunteers, including a home page which provides links directly to promotional materials, information and application processes for volunteering via an easy one-click operation
- ensures printed versions of volunteer recruiting pamphlets are distributed to key community locations such as doctors and dentists surgeries and Volunteer Resource Centres.

### **2. Working with community partners to attract and retain volunteers**

It is recommended that greater consideration be given to collaborative work with DFC funded non-government organisations (NGOs) and Volunteering SA to engage mature age people through such initiatives as:

- joint production of promotional materials linked to DFC Volunteers Unit, either via hyperlink, URL or dedicated web portal on the Volunteering SA web site
- sharing ideas relating to engaging mature age people as volunteers through forums such as Volunteering SA regular 'Round Table' professional forums.

### **3. Engaging Aboriginal and Torres Strait Islanders**

It is recommended that increased effort be made to engage Aboriginal and Torres Strait Islanders as volunteers by:

- DFC Volunteers Unit working with ATSI elders to identify the relative costs and benefits to Aboriginal people of volunteering within government departments and NGOs
- DFC Volunteers Unit involving DFC ATSI Services Division and volunteer managers in forums to explore ways in which further support can be offered to existing ATSI volunteers within DFC and with a view to assessing the effectiveness of recruitment, retention and training programs and reviewing as appropriate.

### **4. Communication and information management**

It is recommended that communication and information management systems be enhanced by:

- establishing a toll-free 1300 telephone number which is published on all

promotional materials to provide one central point of contact for initial calls from potential volunteers

- monitoring volunteering trends through the DFC Volunteer Management Application, a common database to be implemented across DFC in 2007
- ensuring all volunteering information is linked to 'e-reference' translations as soon as this service becomes available
- ensuring print ready versions of pamphlets, fact sheets and brochures are available electronically to be printed on demand.

## 5. Short term volunteering

It is recommended that short term volunteering with DFC be promoted by:

- establishing communication links with the volunteer community to promote short term volunteering in tandem with the communication strategies developed for the Volunteer Emergency Recovery Information System (VERIS)
- ensuring information related to short term volunteering is ready to launch immediately in response to emergency recovery via the internet and electronic news media together with a dedicated toll-free telephone number.

## 6. Criminal history checks

It is recommended that, without compromising mandatory requirements, the processes for screening and criminal history checks be tailored to meet the needs of mature age volunteers to ensure:

- potentially threatening processes are mitigated
- sensitivity, confidentiality and state of the art human services management skills are employed.

## 7. Mandatory unpaid community service

It is recommended that the DFC Volunteers Unit:

- includes within its statements of policy and practice a departmental position on the place of mandatory unpaid community work vis-a-vis volunteering
- identifies strategies for maintaining the interest of mandatory community service workers in volunteering after their time of compulsion has passed by:
  - promoting inclusive volunteer management styles and
  - acknowledging and recognising those who commit to voluntary activity beyond obligation.



## PART 1

### Introduction

This project was a joint initiative between the Department for Families and Communities (DFC) Volunteers Unit and the Office for the Ageing (OFTA) and was intended to promote volunteering by mature age adults with DFC and its funded non-government organisations (NGOs). It was funded through the Community Care Innovations Fund (CCIF). The project commenced in November 2006 with a completion date of August 2007.

The project was a response to South Australia's position as the most rapidly ageing population in Australia. By the middle of this century, it is expected that approximately a quarter of the population of South Australia will be aged 65 years or over (ABS: 2005). It is important that the older population remains as healthy as possible and that high quality services continue to be provided at a reasonable unit cost. Volunteering holds the potential to both positively impact on the health status of older people and to add value to services delivered or funded by DFC.

### The aim of the project

The aim of the project was to identify factors impacting on the engagement of the baby boomer generation, those born between the end of World War 2 and the mid 1960s, and older adults in volunteering, and to recommend strategies to engage these people in volunteering with DFC and its funded NGOs.

To further this objective, the project brief included a report on the project outcomes to DFC executive for the purposes of informing workforce planning within the Department (this report) and the design and production of a suite of promotional materials.

Particular emphasis was attached in the project brief to engaging older CALD and ATSI populations and to harnessing the potential of retirees who are travelling in rural and remote areas of the state – the cohort generally referred to as the 'grey nomads'.

This project has drawn upon existing research and the expertise of the project Steering Committee and Reference Group, to identify and analyse the factors that impact upon the baby boomer cohort and older volunteers, and their decisions about involvement in volunteerism.

### Significance of voluntary activity by older people

The subject of encouraging older people to volunteer, particularly baby boomers, has become significant to governments and non-government agencies across the developed world. This cohort of older people may be expected to be leaving or reducing their commitment to the paid work force over the coming decade, and has often been identified as representing a potential pool of volunteer labour (ABS: 2001, 2003, 2005; FACSIA: 2006; Home Office: 2002; Infinity Consulting: 2006).

Volunteering has become an integral aspect of government workforce planning and is now embedded within key Australian Government policy documents, including *Stronger Families and Communities Strategy* (Department of Families, Community Services and Indigenous Affairs) and *Increasing Workforce Participation* (Department of Employment and Workplace Relations).

State and territory governments have also responded to the potential availability of mature age people as volunteers by commissioning research into volunteering, with a particular focus on the baby boomer generation. Inter alia, the Western Australian (WA) Department of Premier and Cabinet (DPC), commissioned a report proposing strategies aimed at encouraging baby boomers to volunteer (DPC: 2003); and the government of New South Wales (NSW) commissioned several reports on the topic. These include the Heartbeat Trends report *Older People and Volunteering*, commissioned for the 2001 Premier's Forum on Ageing; and a document encouraging intergenerational relations and volunteering, *Experienced Hands* (NSW Department of Ageing, Disability and Home Care: 2002). The current project will contribute to workforce planning that is inclusive of volunteers within DFC.

Non-government organisations have similarly been involved in exploring the nexus between rising numbers of mature age adults and volunteerism potential. Extended Families Australia (EFA) commissioned the report *Recruit a Grandparent*, focussed on encouraging older volunteers in the North East suburbs of Melbourne to participate in volunteering with younger people living with disabilities. The Australian and South Australian governments have both encouraged volunteering by older people as a means of increasing civic participation and at the same time, furthering health and wellbeing outcomes for older people (Australian Government: 2006; *SA Strategic Plan: 2007*). Building upon Commonwealth and state priorities, volunteering goals have been identified in DFC's *Connecting to the Future* (Objective 3 'Independence and Community Connection') and Office for the Ageing's report *Improving with Age: Our Plan for an Ageing South Australia* (2006).

The directions indicated in Commonwealth, state and DFC strategic planning documents have provided the direction for, and contributed to, the content of this project and report.

## Defining volunteering

Traditionally the ABS definition of volunteering as activity that is 'unpaid, without coercion and occurring within an organisation' has been adopted by governments and government agencies alike, including DFC. Ironmonger (2000, 2002) stresses the considerable value of informal volunteering - caring for family members and others and informal helping in the community - to the national economy, and he includes the contribution of carers in his estimation of the economic value of volunteering in South Australia. Ironmonger (2002) estimates that 229 million hours were spent in voluntary work in SA in 2000 at an economic worth of \$4 352 per volunteer per year, of which \$1 582 per person was given in the form of formal volunteering within an organisation (Ironmonger 2002:4-5).

CALD and ATSI communities in particular, commit considerable time and energy to helping others in the community and this tends to be considered as a way of life and 'something that you just do', rather than as volunteering (Kerr et al: 2001). Possibly for this reason, CALD and ATSI people are under-represented in the data on volunteering, but do contribute considerable resources to helping others in ways that are not quantified in formal data collections. Similar findings apply to other groups in Australian society, such as those in the lowest 20% of the income range (Australian Government: 2006).

## Context of the project: the current situation in Australia

### Demographic determinants of volunteering

Demographic trends relating to decline in the birth rate and longer life span has led to a focus on the anticipated demands that ageing baby boomers will place on limited public and private resources, as well as on potential negative intergenerational effects of such demands. On the other hand, baby boomers are likely to have ahead of them more healthy and productive years than earlier generations. As the demands of paid work and family recede, potential and capacity increases for civic activity.

ABS data indicates that volunteering peaks during the middle years of life (ABS: 2002), when volunteering tends to be an extension of home life and connected with school, sporting and church organisations, and is therefore a product of existing connections (Rosenberg-Russell: 1994; ABS: 2002). The 2002 ABS study *Australian Social Trends 2000* (ABS: 2002) indicates that in 2000 the 35-44 year age group demonstrated the highest volunteering rate within the last twelve months, a level of 40 per cent. The 45-54 age group had the second highest, and together these two age groups cover a large proportion of the baby boomer generation. In addition, Finlay and Murray (2005) point out that ABS data does not reflect the number of hours or frequency of volunteering. When frequency and number of hours is taken into consideration, volunteers aged 65-74 years spend the most time of all age groups in volunteering, averaging 2.5 hours per week compared to the over-all average of 1.4 hours per week (Finlay and Murray: 2005).

Wilkinson and Bittman (2002) predict that volunteering rates may rise in the future, as the baby boomer cohort reach retiring age and contribute more hours to their volunteer activities. Volunteering in South Australia, in NGOs at least, appears to be currently enjoying considerable support. In a recent study specific to SA, Wilson, Spoehr and McLean (2005) surveyed 304 organisations over a three week period in April 2004 and found that volunteering in NGOs increased steadily over the period 2001-2003, inclusive of volunteers who contribute to committees. Wilson et al (2005) conclude that increases in volunteering appear to be related in part to the outsourcing of state and Commonwealth services to the not-for-profit sector, the funding for which has increased the resources available to NGOs to expand their activities and hence the opportunities for volunteer participation (Wilson, Spoehr and McLean: 2005).

Finlay and Murray (2005) caution, however, that in order to benefit from the pool of potential volunteers as baby boomers reach retirement age, strategies will need to be in place to attract these people to volunteering at this stage of their lives, and volunteering will need to be responsive and provide opportunities for meaningful participation in the types of activities these people choose to participate in.

In the 65 and older age group compulsion to volunteer through Australian Government mutual obligation initiatives does not apply as it does in younger populations, and so volunteering by people in this age group may be regarded as genuinely a matter of free choice. In the light of the advantages to the community, as well as to the wellbeing and health outcomes for older people, it is not surprising that volunteering has attracted considerable interest from governments in recent years, not least in South Australia – the state with the oldest population in Australia. DFC along with other state government departments is keen to harness the potential of baby boomer retirees.

## The national context

The International Year of Volunteers in 2001 heightened an international awareness of the value of volunteering in both social and economic terms and since this time, and perhaps as a consequence, trends in volunteering have demonstrated changes in management style (Volunteering SA: 2006).

Australia, along with Canada, the United Kingdom and the United States of America, has responded to these changes by introducing bureaucratic and administrative structures to manage volunteering (Office for Volunteers: 2006). In addition, legislative requirements, such as mutual obligation legislation, have made an impact on the way in which volunteering is defined and conducted and sharpens the focus on the role of government in volunteering.

Volunteering in Australia occurs within a framework that is impacted by political initiatives as well as by Commonwealth and state government legislation and policy imperatives. In South Australia, political and legislative requirements since 2000 have been administered through the state government Office for Volunteers (OFV).

Political influence is reflected in the fact that since the late 1990s people who have been receiving certain government social security benefits for a specified period of time are required to undertake an activity selected from a range of options, including Work for the Dole and unpaid community service work. This latter activity is often described as 'volunteering', despite the philosophical and definitional difficulties associated with this terminology. Wilson, Spoehr and McLean (2005) find that these social security provisions which were implemented in Australia in 1999 may have influenced increases in self-declared voluntary activity in Australia in recent years.

This legislative requirement is briefly reviewed here because it impacts upon the definition of volunteering as 'freely given and of one's own free will' (Volunteering Australia: 2003; ABS: 2000; DFC: 2006). Although mutual obligation and Work for the Dole provisions do not apply directly to volunteers aged 65 years and over, mandated community service work within not-for-profit organisations holds potential for impacting upon relationships between volunteers and the organisation, and between volunteers themselves.

## Mutual obligation in Australia

Mutual obligation is predicated on the philosophy that welfare assistance provided to the unemployed of working age should involve reciprocal responsibility. In Australia this requires unemployed job seekers on Newstart and Youth Allowance programs to actively seek work, strive to improve their competitiveness in the labour market and contribute to the community. Mutual obligation activity requirements apply to those who are aged 18-24 years and have been receiving Newstart or Youth Allowance for six months; or are 25-34 years old and have been receiving Newstart Allowance for 12 months (Yeend: 2004).

Jobseekers are considered to be meeting their mutual obligation requirements when they are undertaking one of the accepted activities. These activities include: unpaid work, part-time paid work, Work for the Dole schemes, Community Development Employment Projects, Green Corps, approved literacy and numeracy training, English for migrants programs, part time study and career counselling (Yeend: 2004).

Court ordered Community Work Orders and work arising through mutual obligation provisions challenge the concept of volunteering as defined by Volunteering Australia and others (Volunteering Australia: 2000, ABS: 2000). Other types of unpaid work which Volunteering Australia does not accept as falling within their definition of volunteering include student placements and work experience students.

Graff's (2006) paper for Volunteering Canada concentrated on terminology. She suggests that 'mandated community service work' is the term that appropriately describes the input of people working within community services as a matter of compulsion as opposed to volunteers.

Ellis and McCurley (2002) maintain that the issue to be addressed in acknowledging the contribution of unpaid community workers is 'whether and why people *remain committed* to their service (rather) than what made them start in the first place' (Ellis et al: 2002 – authors' emphasis).

NGOs funded by DFC will almost certainly include Work for the Dole and Community Work Order participants in their programs and will open the debate surrounding what constitutes volunteering. DFC will need to develop a clear policy relating to unpaid community service work in order to clarify issues such as insurance, reimbursement entitlements, recognition and retention strategies.

## The state context

DFC volunteering initiatives exist within the context of both Commonwealth and state policy frameworks and initiatives relating to volunteering, and since the International Year of Volunteers considerable activity has occurred at the state level. Significantly, the Office for Volunteers (OFV) was established in South Australia charged with overseeing legislative and policy development as it relates to volunteering in SA, identifying priority areas for change and promoting and coordinating research relating to volunteering (OFV: 2006). DFC has worked closely with the OFV through community and executive level consultancy mechanisms in developing volunteer capacity.

OFV has managed the development of a partnership between the South Australian Government and volunteers, which is reflected in the publication *Advancing the Community Together* (ACT) (OFV: 2003) which was produced in 2003 with the intention of strengthening the relationship between government and the voluntary sector.

The structural framework supporting this initiative includes two ministerial advisory mechanisms: the Volunteer Ministerial Advisory Group (VMAG), a coalition of 29 community members with responsibility for overseeing and supporting the partnership, liaising directly with the volunteer community, identifying priority issues and developing targets; and the Volunteer Partnership Action Committee (VPAC), a consortium of senior executives from government departments, contributing to governance and effective implementation of the ACT partnership. VPAC members work with VMAG in implementing areas of priority for the volunteer sector.

Key outcomes of the ACT partnership hold particular significance for management of volunteering within DFC including attempts to simplify the screening and criminal history check procedures for volunteers. A number of research reports have been commissioned with South Australian universities, which support decision making at the state level relating to volunteering, including the Mayer report *The Wider Economic*

*Value of Volunteering* (2003) and the Ironmonger report *Valuing Volunteering: the Economic Value of Volunteering in SA* (2002). More recently the Gill report, *Older People and Volunteering* (2006) has contributed to a research base relating to volunteering and mature age people in South Australia.

Legislation has been introduced to protect South Australia's 420 000 volunteers in the form of the Volunteer Protection Bill 2001. The purpose and intention of this legislation, which was promulgated in 2002, is to provide protection for individual volunteers from personal liability while undertaking volunteering duties on behalf of an incorporated organisation, and to encourage people to volunteer their time to community organisations without fear of litigation (OFV: 2006).

## Partners in volunteering in South Australia

### Volunteering SA

Volunteering SA is a peak body for volunteering in South Australia, and its purpose and mission is to promote volunteering and provide leadership in advancing volunteering in South Australia. As a point of first enquiry for volunteers, Volunteering SA is an important partner in attracting volunteers to DFC.

Volunteering SA is staffed by a combination of paid and volunteer staff who provide advice and support to people entering volunteering either of their own volition, or through Australian Government initiatives such as mutual obligation and Work for the Dole provisions.

Volunteering SA coordinates regular network meetings for volunteer managers in metropolitan and regional areas, contributes to initiatives for National Volunteer Week and Volunteers Day and provides literature, information and advice on volunteer management issues.

A funding arrangement exists between DFC and Volunteering SA which contributes to core functions related to promoting and supporting volunteering in SA.

### Funded non-government organisations (NGOs)

DFC funds some six hundred community projects, mainly delivered through the auspices of NGOs. Volunteers work in these agencies as well as within the divisions and branches of DFC itself. Most NGOs have developed their own guidelines and protocols relating to volunteering, but DFC retains an interest in service standards and outputs as a condition of the funding agreement. Potential exists for collaborative work with Volunteering SA to engage mature age people in volunteering in NGOs funded by DFC. Volunteering SA is currently undertaking *Your Best Years* project relating to engaging mature age people in volunteering. There is potential for the development of synergies between DFC and this Volunteering SA initiative. Development of promotional materials with an audience wider than DFC is one such possibility. Collaborative initiatives that aim to increase volunteerism across both government and the NGO sector hold the possibility for optimal cost-benefit outcomes for government in terms of reduced health expenditure and value-adding to services.

### Healthy volunteers, healthy economy

Although not entirely unanimous (for example Ziersch and Baum: 2004) the majority of research indicates that improved health and wellbeing outcomes for older people have been associated with volunteering (Oman et al: 1999; Onyx & Warburton: 2003; Musick and Wilson: 2003).

The relationship between volunteering and healthy ageing has now been quite extensively explored, especially in the North American literature (Oman et al: 1999; Okun et al: 1993; Musick and Wilson: 2003) and more recently in Australia (Onyx and Warburton: 2003). Promotion of the health benefits of volunteering are important to stress in relation to engaging mature age people as volunteers. Volunteering holds the potential for mature age people to contribute to the social and economic wellbeing of the state, increase their prospects and choices, introduce or build a social network, provide for continued engagement and involvement and contribute to social capital.

The actual economic value of volunteer work has been the subject of some considerable debate, dependant as it is upon a definition of the term 'volunteering',

however, it has been estimated that in South Australia \$1 582 per person was given in the form of formal volunteering within an organisation; that \$486 million dollars worth of voluntary work was contributed to community and welfare organisations, and that the economic value of volunteering to the state increased from \$948 million in 1995 to \$1 810 million in 2000 (Ironmonger 2002:4-5). Benefits of volunteerism to government can be balanced by a health and wellbeing benefit to the individual volunteer, and a dividend to the community in the form of increased social capital.

In addition to providing a means for social contact, doing something worthwhile, and individual feelings of worthiness and value, volunteering may present the opportunity for older people to form associations with other people with similar interests, to make use of hard won skills and to participate as a part of a group in activities that further their interests. This in turn may be anticipated to result in empowerment and increased confidence and autonomy and contribute to civil society and citizenship.

### **Volunteerism as a feature of citizenship**

Social inclusion has been associated with a concept of citizenship that relates to identity and culture (Craig: 2000; Lister: 2001; Castles et al: 2000) and is a significant feature of South Australia's social policy (*SA Strategic Plan: 2007*). It is also reflected in DFC's strategic planning document *Connecting to the Future* and in OFTA's planning document *Improving with Age: Our Plan for an Ageing South Australia* (Office for the Ageing: 2006). Recognising the contribution, and enabling and encouraging the participation of mature age volunteers is a significant feature of this report, which contributes to the commitment made by DFC to social inclusion as it applies to older people in South Australia.

Lister (2001) argues for citizenship, in the form of social inclusion, as the common right of wage earners, volunteers and carers of all age groups. Volunteer organisations have traditionally been seen as a bridge between citizens and the state, since Alexis de Tocqueville drew a link between the importance of civic participation and democracy some two hundred years ago (cited in Halman: 2003:196). It has been argued (Halman: 2003:196; Scott: 1981) that through membership of organisations, volunteers are able to express their views and press their demands upon government and hence increase their opportunities as active citizens.



## PART 2

### Influencing mature age people to volunteer

Whilst this section of the report is concerned with recruitment of mature age people, it is important to balance this content with consideration to volunteer retention strategies. Existing DFC volunteers are critical to the 'word of mouth' aspect of recruitment and are a valuable resource that cannot be easily replaced. Excellence in DFC volunteer management should therefore be considered in tandem with recruitment strategies.

#### Attracting the interest of the target group

Attracting the interest of mature age people starts with terminology. Comments from the project Reference Group have included the use of the term 'older people' and 'baby boomers' as potentially off-putting to the new retiree cohort. It was agreed that the term 'mature age' was more appropriate and less alienating to the target group. This point is also made by Gill in her recent paper commissioned by the South Australian Office for Volunteers (2006:2). Terminology in all promotional materials developed reflects this language preference.

CALD and ATSI populations, as well as economically disadvantaged groups have been shown to be under-represented in volunteering generally (Warburton et al: 2004; Kerr et al: 2001). Assuming these groups wish to access the benefits of formal volunteering, it is important for DFC to provide equitable access to promotional resources and activities relating to volunteering opportunities.

The most effective volunteer recruitment tool has consistently been shown to be word of mouth through existing volunteers (McCurley: 2007; ABS: 2005; Rosenberg-Russell: 1990). Benefits of this strategy relate to its demonstrated effectiveness, particularly in CALD and ATSI communities, and the fact that it is cost neutral. If there is a disadvantage to this mode of recruitment, it is that it tends to mitigate against heterogeneity, since existing volunteers will tend to recruit within their own sphere of activity and influence, within the same church or community group, similar age, ethnicity and so on. In some NGOs this might not be problematic and even beneficial where services are designed to be ethno-specific for example, but may not be ideal in DFC or in NGOs serving a wider constituency.

The success of word of mouth recruitment relates to having a diverse pool of satisfied and motivated volunteers who are keen to discuss with their contacts the benefits of volunteering within DFC and funded NGOs.

The project Reference Group also stressed the value of the spoken word specifically in recruitment of volunteers from CALD communities through ethnic radio, an aspect that is reflected in the recommendations of this report.

#### Brainstorming

The DFC Volunteer Contact Group comprises members representing key business units of DFC and Office for Volunteers. Brainstorming within this setting and similar forums, both within and between DFC funded NGOs may be a useful strategy to facilitate the sharing of ideas relating to promoting volunteering within DFC to a wider constituency. Building upon this strategy, mapping of potential sources of volunteers facilitates a targeted approach to recruitment.

## Print

Volunteering England (2006) has identified posters as a useful way for reaching a wide audience and leaflets and postcards as a handy way of providing information to potential recruits.

Volunteering England (2006:3) identified key points in relation to the use of printed recruitment material: keep it simple, ensure that the design clearly reflects the recruitment message and keep in mind the target audience. DFC sought to encourage mature age volunteers, and hence promotional materials have focused on reflecting the identified preferences of this particular group.

Outlets for printed information such as posters will logically be where most people visit at some time or other; where particular target groups tend to congregate, such as multicultural community centres and clubs; and ATSI gathering places. Venues likely to be accessed by baby boomer retirees and older people in general include: doctors and dentists surgeries, libraries, religious venues, shop windows, Centrelink and job recruitment centres. DFC should also consider making information available at Volunteering SA and Volunteer Resource Centres.

Printed promotional materials are a useful strategy to recruit volunteers generally and to target specific populations, with the ability to be produced in several languages. A well-designed poster or brochure can attract attention and promote the image of DFC and its funded NGOs. Overall this is a relatively cost-effective approach.

If not well managed, there can be some disadvantages to this approach that should be considered. Posters and printed material may hang around for a long time and become dated. They also tend to be less effective if used as a stand alone initiative. It is useful to consider placing posters in DFC business units, Volunteering SA, NGOs, or some place where staff will take responsibility for ensuring the currency of information and having knowledge to respond to questions that may be raised about volunteering opportunities.

## Electronic media

As previously indicated, baby boomers represent a generation of adults approaching retirement who are better educated than previous generations. They are the first generation to retire with levels of computer literacy and in many cases are willing and able to access information readily available on the world wide web. DFC needs to be cognisant of the fact that a growing number of people rely on the internet as a source of information and ensure volunteering information is readily available on a dedicated web portal on the DFC website and other websites with whom DFC works in partnership.

## Local press and radio

Events such as National Volunteers Week provide an opportunity for regional exposure. Coverage could include news stories and feature articles stressing the human interest aspects of volunteer involvement in the local community. DFC will access this opportunity for recognition of volunteers.

Direct advertising and information columns in the local press could be tailored to attract mature age people approaching retirement. Advantages to be stressed include: meeting other people, staying connected to the community, and health benefits. Considerations when purchasing advertising include: ensuring that the advertisement reflects the diversity of the community, checking circulation rates and advertising costs, and ascertaining whether potential exists for discounts for volunteer advertisements (Volunteering England: 2006).

## Short term volunteering within DFC

Short term volunteering within DFC is primarily suited to emergency recovery, since volunteering involving establishing relationships of trust and caring rely upon the development of the relationship over time. For this reason, short term volunteering for the purposes of this paper has focused on emergency recovery and is linked with the development of initiatives within DFC to encourage and facilitate short term emergency recovery responses. Older people travelling around Australia in retirement have been identified at a national and state level as a potential source of short term volunteers, and it is therefore fitting to relate the current project to contemporary research relating to this group, commonly referred to as 'grey nomads'.

## Grey nomads as volunteers

The potential of grey nomads as volunteers has attracted interest in recent times, as they are keen to involve themselves in local activities to which they bring a variety of skills and experiences (Volunteering Australia: 2007).

Most grey nomads try to experience all that an area has to offer before moving on, extending their stay if there are activities of interest. They are enthusiastic about experiencing and learning about the outback and value the information provided by locals. Volunteering Australia is currently researching the untapped potential for the development of mutually beneficial relationships between grey nomads and isolated rural communities through voluntary programs (Volunteering Australia: 2007).

## Existing research on grey nomad potential

Volunteering Australia's current research forms part of a two-year project in partnership with Professor Jenny Onyx (UTS) and Associate Professor Rosemary Leonard (University of Western Sydney). This national research project is funded under a Commonwealth Australian Research Council (ARC) grant to work with selected outback Australian towns to develop partnership projects with grey nomads (Volunteering Australia: 2007). Two South Australian towns have been included in the project, Kimba and Roxby Downs, and reports on these areas are available on the Volunteering Australia website:

[http://www.volunteeringaustralia.org/html/s02\\_article/article\\_view.asp?id=2251&nav\\_cat\\_id=156&nav\\_top\\_id=66&dsb=5465](http://www.volunteeringaustralia.org/html/s02_article/article_view.asp?id=2251&nav_cat_id=156&nav_top_id=66&dsb=5465)

The ARC funded research project aims to: identify criteria for grey nomads to be willing and able to engage in volunteering in isolated rural communities; support isolated towns to address their development needs through voluntary programs for grey nomads; document, evaluate and support the towns' implementation of the programs; develop social capital theory in the context of shifting populations; and inform models of short term volunteering for older people generally (Volunteering Australia: 2007). The project is expected to be completed in late 2007. For DFC, the research findings relating to items *Identify criteria for grey nomads to be willing and able to engage in volunteering in isolated rural communities*, and *Support isolated towns to address their development needs through voluntary programs for grey nomads* hold potential to inform short term volunteering in DFC in regional areas of the state.

The benefits of encouraging short term volunteering by grey nomads generally have been identified within the ARC project as:

For towns:

- grey nomads stay and spend, bringing economic power to the community
- project development
- utilisation of resources and skills of grey nomads

For grey nomads:

- learning about the local area
- meeting local people
- opportunity to contribute to rural sustainability (Volunteering Australia: 2007).

Each of these benefits relating to development of the wider community has potential spin-offs for DFC operations, in terms of stronger communities and social capital development.

There does not appear to be any discussion about encouraging grey nomads to Aboriginal communities to volunteer, as has been mooted elsewhere (Brough: 2006 in press). This aspect of the grey nomad initiative has met with mixed responses in the media, from messages of support to claims of paternalism (ABC Radio National: 2006).

The notion of harnessing the potential of grey nomads as volunteers is one which has gained currency relatively recently. Existing reports concentrate on tourism and cultural areas of interest, such as restoring monuments and museums and flora and fauna preservation. Within DFC, recent emergency recovery operations involving DFC personnel have stimulated an interest in the potential for engaging grey nomads in short term recovery operations, with the development of the Volunteer Emergency Recovery Information System (VERIS) to assist in managing information of mature age and temporary residents, among others, who are available for volunteering in the recovery phase of an emergency.

## Discussion of project outputs

The opinion of the target group was represented through the project Steering Committee and Reference Group. Additional consultation was undertaken with the OFTA Aboriginal Team in order to explore as fully as possible strategies to engage Aboriginal people in volunteering in DFC. CALD consumers were represented through the Multicultural Communities Council (MCC), older people through Council on the Ageing (COTA) and volunteers through Volunteering SA.

Advice relating to reaching the CALD community focussed on the value of personal contact, the influence of key community leaders and ethnic broadcasting. Action has been taken to involve DFC directors in implementation of this aspect and negotiations are in progress with business units and DFC Media Unit. Optimal impact is likely to be effected through introducing radio input simultaneously with the launch of other products.

Access to promotional material in languages other than English will be through the DFC e-reference facility when this becomes available and preliminary discussions have been undertaken with DFC Customer Services Division to this effect. In the meantime, 'print ready' versions are to be held electronically to be printed in the required language on demand.

Whilst the defined audience was engaged throughout the life of the project, challenges were identified in developing resources that would be effective in attracting ATSI volunteers. Advice from Aboriginal representatives indicated that firstly, since both the nature of the project and the actual process of volunteering within DFC was essentially Eurocentric in nature, it would be unlikely that Aboriginal people would be persuaded to participate. Secondly, the high levels of socio-economic disadvantage were claimed to mitigate the involvement of Aboriginal people, since this circumstance generally brings about a focus on more immediate needs. Thirdly, Aboriginal people are generally involved in extensive informal caring within their families and communities and would, of course, be likely to give precedence to this constituency over volunteering in a government department or funded organisation.

This feedback would tend to indicate that more research is required on the specific costs and benefits to Aboriginal people of formal volunteering within an organisation. In particular, it would be useful to know whether the same health and wellbeing benefits apply to an ATSI volunteer population as those reported in earlier American (Okun: 1993; Oman et al: 1999) and Australian (Onyx and Warburton: 2003) studies, which did not specify an input from Aboriginal People; and to build upon the South Australian work of Kerr et al (2001) in relation to ATSI and CALD volunteers. It may be useful to consult with Aboriginal elders regarding how DFC may best support ATSI volunteers in areas where they are directly involved with DFC through family members, such as the Family Support Program or Grannies Program. Portrayals of ATSI volunteers in these roles were included in promotional materials.



## PART 3

### Management of the project

#### Background

DFC Volunteers Unit has undertaken foundation work for the consistent management and coordination of volunteering within DFC and in providing assistance to its funded NGOs. Critical foundations underlying a recruitment campaign for mature age potential volunteers and others have been the development of:

- DFC Volunteering Policy
- DFC Volunteer Charter of Mutual Obligation
- DFC Volunteer Operational Guidelines
- systems and supporting structures for the management of volunteers in the recovery phase of a state emergency
- a series of reward and recognition events
- a central access point for dealing with enquiries, and
- a toll-free telephone number.

#### Scope

The scope of the project was to:

- research and document the emerging volunteering needs of DFC and its funded NGOs
- research and document models of best practice in recruiting, training and retaining baby boomer retirees
- identify and prepare contingencies for engaging older volunteers in the recovery phase of emergency management
- prepare resource materials for use by DFC funded NGOs to assist them to:
  - understand the needs of baby boomer volunteers; and to
  - implement models of best practice in recruitment, training and retention of volunteers.

Whilst the potential existed for the project to investigate intergenerational issues related to volunteering, the focus of this project was maintained on that cohort of the population in the immediate pre-retirement age range and those in retirement.

Intergenerational issues such as the engagement of young people as volunteers and their potential links with older volunteers were not the focus of this project and may form the basis of future work.

#### Project governance

The project was managed by Jenni Adams – Senior Project Officer.  
The project sponsor was Stephen Blight - Director Volunteers  
The project was funded by the Office for the Ageing.

The primary client was Sue Vardon, Chief Executive – on behalf of DFC business units and DFC funded non-government service delivery providers.

The project was also supported by a Steering Committee and a Reference Group representing the interests of stake holders.

## The Steering Committee

The Engaging Older Volunteers (EOV) Steering Committee played a significant role advising on the implementation and management of the EOV project.

### *Role and purpose*

The role of the Steering Committee was to provide advice on the management of the project relating to the development of initiatives to engage volunteering by the baby boomer generation and older people, with particular attention to ATSI and CALD people and grey nomads.

The EOV Steering Committee represented the strategic priorities of the project by advising on project management issues, in particular:

- progress of the project against its stated objectives
- prioritisation of the allocation of project resources
- budget
- processes for effective consultation
- avenues for promoting the project and its outcomes.

### *Membership*

The Steering Committee comprised nominees from Office for the Ageing, Council on the Ageing, Volunteering SA, the Office for Volunteers and the DFC Volunteers Unit. Members were selected in consideration of their investment in the project outcomes at either a local or wider level.

### *Meetings*

Two face to face meetings were conducted and ongoing communication was maintained by e-mail. An electronic contact list was developed to ensure on-going communication with the Steering Committee.

### *Duration*

Membership of the Steering Committee was for the term of the project, scheduled to be finalised on 17 August 2007.

## The Reference Group

### *Role and purpose*

The role and purpose of the EOV Reference Group was to assist in the development and implementation of the project. The EOV Reference Group supported implementation of the strategic priorities of the project by advising on:

- broad strategies that support volunteering by older people, CALD and ATSI people across the South Australian community
- barriers and obstacles to volunteering by baby boomers and older people in the community
- contingencies for preparing older volunteers to engage in the recovery phase of a declared emergency
- innovative and responsive initiatives to encourage volunteer participation by the target group

- strategies for the development of resources to attract baby boomers and older volunteers
- implementation of promotional strategies and events to launch the promotional material, and
- advising the project manager on the content and presentation of promotional materials directed towards potential volunteers in the target group.

### *Membership*

Membership comprised representation from:

- DFC ATSI Services Division
- DFC Volunteer Contact Group
- Volunteer Ministerial Advisory Group
- Department of Environment and Heritage
- Meals on Wheels, and
- Multicultural Communities Council

and aimed to provide a broad representation of DFC funded organisations, representatives of older people and people with experience in developing volunteering in South Australia.

### *Meetings*

Two face to face meetings were conducted and ongoing communication was maintained with the Reference Group by e-mail.

### *Duration*

Membership of the Reference Group was for the term of the project, scheduled to be finalised in August 2007.

## Involvement of the target group

Mature age people were represented through representative organisations, including CALD and ATSI groups. Rural representation was through the same bodies. Grey nomads were not represented as a unique group. This was due in part to the addition of this target group after the formation of the Reference Group, and in part to the peripatetic nature of the group and potential for difficulty in recruiting sustainable representation.

## Diversity

Diversity amongst volunteers is an important goal for DFC, in order to reflect the composition of the community and extend the horizons of DFC, as well as to extend the health and social benefits of volunteering equitably. This project was to explore the recruitment of CALD and ATSI volunteers, who have been shown to be less well represented than other Australians in formal volunteering. However, as has been demonstrated elsewhere in this report, the project encountered several limitations in this regard.

## Outputs

### Output 1

Output 1 comprised a comprehensive written report on the project.

### Output 2

Output 2 comprised a brochure offering guidance on selecting promotional materials and a suite of promotional materials which included two pamphlets, a poster, a handbook 'shell', radio and community service announcements.

### Output 3

Output 3 comprised a written report which examined contingencies for engaging short term volunteers within DFC.

## Project method

The project method used a variety of qualitative data gathering, analysis and presentation techniques. A literature search and review of extant research was undertaken, and consultation with the project advisory body, the Reference Group, and with the Steering Committee. DFC wide advice was obtained through communication via regular meetings of the (existing) DFC Volunteer Contact Group. Reports were presented to these groups on a regular basis and the advice and recommendations of members was sought on individual issues as required.

Writing up and evaluation of the project was undertaken on an on-going basis throughout the life of the project.

Graphics for promotional material were chosen on the basis of portraying diversity in culture, ethnicity and abilities. Photography was accessed from authorised sources including the 2007 Riverland storm response and existing DFC gallery resources. The DFC Principal Design Consultant photographed within Disability SA facilities in order to capture 'action' shots of the client group with volunteers and obtained permission for publication.

Outputs relating to production of reports and promotional materials were completed on time in collaboration with the Project Team, Steering Committee, Reference Group, staff of the DFC Volunteers Unit, DFC Media Unit and the DFC Principal Design Consultant.

## Conclusion

Volunteerism in South Australia contributes much both to the economy and to social capital, a fact which is recognised by the inclusion of a target in *South Australia's Strategic Plan*, DFC's strategic planning document *Connecting to the Future*, and in OFTA's strategic plan *Improving with Age: Our Plan for an Ageing South Australia*.

Volunteerism has been positively associated in several analyses, both in Australia and overseas, with improved health status of mature age people, and there are opportunities therefore, for the building of synergies between positive outcomes for volunteers and fiscal and social benefits to the state.

As the population of this state continues to age, potential exists for DFC to build upon the goodwill and skills base of retirees, to the mutual benefit of the organisation, volunteers and the social fabric of South Australia. DFC is proud to take this opportunity to welcome mature age volunteers as partners in delivery of first class services to the citizens of South Australia.



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