

Age of Opportunity

Older people, volunteering and the Big Society



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ResPublica
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About ResPublica

ResPublica is an independent, non-partisan UK think tank founded by Phillip Blond in November 2009. We focus on developing practical solutions to enduring socio-economic and cultural problems of our time, such as poverty, asset inequality, family and social breakdown, and environmental degradation.

Our research combines a radical civic philosophy with the latest insights in social policy analysis, economic modelling, behavioural economics, management theory, social psychology and technological innovation to produce original, implementable solutions. We would like to foster new approaches to economic inequality so that the benefits of capital, trade and entrepreneurship are open to all. We believe that human relationships should once more be the centre and meaning of an associative society, and that we need to recover the language and practice of the common good. Our work seeks to strengthen the links between local individuals, organisations and communities that create social capital.

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Foreword

Phillip Blond, Director ResPublica

The rapid ageing of our society creates many challenges – from the provision of healthcare, to work, pensions, savings, housing, and of course social care – but ageing should not be framed negatively. It provides opportunities to use the skills and experience of older people to help strengthen or even re-create civil society. Older people already make a positive and wholly disproportionate contribution to our society by volunteering, charitable giving and helping to maintain the values and principles underpinning our civic society. In the future we and they can do more to significantly boost participation and volunteering, providing the time and experience to transform our civic culture and help people of all ages. We need to rebuild the links between the different sections of our society and recover connections and restore engagement – while the young are often encouraged to aid the elderly, the old can also help the young, just as the advantaged can aid the disadvantaged and the skilled the unskilled.

In this report, we examine the trends in ageing, the many different forms of contribution by older people to society and explore how older people can be helped and encouraged to volunteer in greater numbers and take more responsible roles in our society. Big Society is not just about volunteering, it is about association in its broadest sense. It includes among other things new forms of economic and social renewal, a new community-based form of health and well-being, a different role for the state, a radical localism, and the creation of a new form of social and civic solidarity – be it simply good manners or communities coming together to challenge crime. But volunteering does have a crucial and decisive role. It creates a wealth of social capital that can help platform and propagate all the other goods that most people want and many more need.

In this regard older people are vital. Government can facilitate their volunteering, at low cost at a time of austerity, by helping to inform older people about opportunities for involvement and by changes to taxes and regulations to make it easier for older people to offer their services and knowledge to the whole community. Charities can also do more to publicise the existing contribution of older people, encouraging many more older people to get involved, not least by providing more challenging roles for volunteers.

Radical civic thinking must also be employed to find new solutions: in this report we highlight four schemes that draw on social capital to provide care services in Japan and in the UK, car rides in the US for older people and adult education in Europe and elsewhere. The Big Society can be used to help older people, and they themselves can do much to help build it.

Janet Morrison, Chief Executive, Independent Age

Independent Age is delighted to have sponsored and contributed to this report. As a charity working directly with thousands of older people, we know the enormous contribution they make to their families, communities and society as a whole. Yet all too often they are portrayed as aged, infirm and out of touch.

We hope this report helps change that perception. It demonstrates that older people are already, as the title says, the biggest part of the Big Society, and it considers how this level of civic engagement can be maintained and increased. We think the answer to that may lie in some of the 'groundbreakers' outlined in the report – organisations that are using new or different ways of working to increase the involvement of volunteers and provide more effective services.

The report also considers the role of government at this time of austerity and budget reductions. We suggest it can play a role not just as a funder and commissioner but as an 'underwriter' of 'Big Society' activity, using its authority to back voluntary activity that may need years or even decades to become fully embedded. The Japanese 'care credits' schemes and the lesser-known car-sharing ventures in the United States seem to us excellent examples of these sorts of initiatives.



Executive Summary

The Big Society is about individuals and communities solving their own problems. Through mutual and reciprocal engagement people can make their own decisions about what is best for them and their communities and take an increased sense of responsibility for their lives. The Big Society is about building on the huge strengths, energies and skills that are already being put to use throughout Britain, not trying to create them from scratch. **The Big Society already exists – it just needs to get bigger.**

Older people already make a disproportionately large contribution to the Big Society. As a group, they do more than their fair share of volunteering, charitable giving, voting and other forms of civil engagement, from petitioning to becoming councilors. In doing this, there is evidence from social science and gerontology that they are not just helping others but also themselves. Volunteering, for example, is good for people's mental and physical health, and because it has been quite widely studied, it is the main focus of this report. Other kinds of civic engagement are likely to be similarly useful to participants (though the demands placed on older people through the caring roles often asked of them has a more complex and difficult impact).

This understanding should be reflected in government action. **Government is not the same as 'society', but it can help society to flourish.** In point of fact it already does this in a number of ways. Firstly, in some cases it provides the financial support that underpins volunteering and other initiatives. Austerity measures will inevitably put some of this funding under threat. But government has other, in some ways more important, roles to play. It can provide the organisational framework or platform that allows initiatives to begin and take root, and, we argue, it can play a vital 'underwriting' role, giving users of initiatives confidence that these new schemes will be long-lasting. This is particularly the case in maintaining credibility for long-term timebanking schemes, where involvement today is only paid back later in life. We look at two such schemes in this report – the Japanese care credit movement and the United States' Independent Transportation Network.

Civil society organisations, particularly charities already using volunteers, also need to respond (and of course many already do so, as this report shows) to the growth in the number of older people. In particular, civil society organisations need to pool their knowledge on how to adapt to the generation now entering retirement. The baby boomer generation is healthier and wealthier than previous generations and, compared to the generations following them, fewer will need to work into their late sixties or early seventies. However, they may demand more than previous generations in the choice of volunteering opportunities and the ability to use everyday technological skills which they acquired in working life. Most organisations need to know how to use and develop these skills.

The fact that older people already volunteer, vote, donate and engage in the community more than most other age groups is itself a route to further progress. The 'nudge' approach, endorsed by the Coalition Government in its creation of the Cabinet Office's Behavioural Insight Team, suggests that Government accepts that the example of others in one's group can be highly motivating. Showing that others with whom one identifies are already acting in a certain way should and does prompt imitation. **So it is doubly important to communicate how much older people do for the Big Society** – not just because that is the reality, but because that message, if appropriately put, should inspire others to follow suit.

Government and businesses, together with heritage organisations (such as the National Trust), orchestras and concert halls, with many older people among their members, can help create and **reinforce a social norm that Big Society action is central to later life**. To assist with this, if heritage and arts organisations have among their members would-be volunteers whose skills they cannot themselves use, they should make available to them information about alternative opportunities. Employers could do likewise, as could private pension providers, for the benefit of their clients, particularly in the run-up to retirement. Even government departments could do the same in communications with the public.

In this report we make the following recommendations:

- The forthcoming Giving Summit, to be held in autumn 2011, should include a special session on volunteering and civic engagement by older people, providing an opportunity for charities to share best practice in recruiting, retaining and developing older volunteers.
- The government should deliver on its *Giving White Paper* promise to train ex-civil servants as voluntary volunteer managers to support charities, and must make its experience available to employers to enable them to do the same.
- Following on from the Hodgson Report, as soon as the outstanding questions about regulation and volunteers' exposure to legal liability have been clarified, there should be a joint charity 'myth-busting' publicity campaign to reassure potential volunteers and charity trustees, wherever possible, that their concerns are mitigated.
- Charities that still apply upper age restrictions to their volunteering practice should stop doing so.
- Heritage and cultural organisations whose mailing and membership lists include large numbers of older people, and which do not use these people as volunteers themselves, should be encouraged to attach to their mailings regular reminders of information gateways on volunteering, such as that of Volunteering England.
- Similarly, at little cost, pension providers in contact with the about-to-retire and the recently retired should include links to a new portal with information about volunteering opportunities and other civic engagement.
- Government departments and agencies, such as the Department of Work and Pensions and HMRC, should also include this information in their communications to those approaching retirement or already retired, although it would have to be clear that there was no element of compulsion.
- Employers should look at providing information about volunteering and civic engagement opportunities to older people being made redundant or retiring early. This could be promoted by the Department for Business Innovation & Skills through the Every Business Commits programme – which sets out areas in which Government and business can work together to help build the Big Society.
- Businesses should ensure that employer-supported volunteering is promoted to older as well as younger employees.

- The impact of the 2011 changes in National Insurance rules for grandparents providing child care (and the 2010 changes for carers) should be evaluated by government and older people's charities to see whether they could be recast to incentivise volunteering.
- Councils should give active consideration to supporting a UK equivalent for the USA's Independent Transportation Network, and councils and the Department of Health should consider what support they could provide for a UK equivalent of the Japanese care credit schemes. Both councils and national government should go beyond the traditional roles of funding and organisation and consider how best they can act as 'underwriters' for schemes that involve long-term banking of credits.
- The voluntary sector's contracting and service agreements with local government should include performance indicators for involving volunteers which encourage volunteers to be used effectively.
- Philanthropy UK, the free service receiving £700,000 in government funding to encourage mass affluent and high-net-worth individuals seeking to give money, should also promote volunteering and other civic engagement opportunities, as should the private banks which are being encouraged to develop high quality philanthropy advice.

Introduction and aims of this report

David Cameron: “Responsibility is not just about what you get from the state, it’s about what you give to society too. I didn’t invent the idea (of the Big Society). It is just how I describe all the many brilliant things that people are doing to help each other in our communities.”
23 May 2011^[1]

The Commission on Big Society set up by the voluntary sector’s association of chief executives, ACEVO, defined the Big Society as one...

“...in which power and responsibility have shifted: one in which, at every level in our national life, individuals and communities have more aspiration, power and capacity to take decisions and solve problems themselves, and where all of us take greater responsibility for ourselves, our communities and one another”.^[2]

One of the difficulties the Coalition Government has faced as it seeks to communicate the Prime Minister’s concept of the Big Society is that he is talking about ways of behaving that exist already, as well as asking for much more of **what civil society has always done** to provide mutual support in the space between the market and the state.

What we show in this report is that, where the Big Society described by David Cameron already exists, it is older people who do more than their fair share of the good work. Through charitable giving, voting, volunteering, engagement in local civil society and caring for grandchildren and one another, older people already are the Big Society in action. Older people’s volunteering was recently valued at £10 billion a year, and a quarter of all families are estimated to rely on grandparents for child care, contributing nearly £4 billion a year to the economy.^[3] As the columnist Charles Moore has put it: “Oldies provide, proportionately, the biggest bit of the Big Society”.^[4]

If the Big Society is about people power, it is also about older people power. Older people, often freed from responsibilities of employment and raising families, are a huge resource – currently they **volunteer** more, **give** more to charity, get more **involved with their communities** and **vote** more than other generations do. Yet in government initiatives so far, for example the *Giving White Paper*, which aims to increase the giving of time and money to charitable organisations, there has been little public recognition of this fact.^[5] By contrast, perhaps the most high-profile Big Society engagement initiative, especially after the riots, is the young persons’ National Citizen Service scheme.

1. Speech on the Big Society, 23 May 2011, available at <http://www.number10.gov.uk/news>

2. ACEVO, *Powerful People Responsible Society: The report of the Commission on Big Society* (2011).

3. WRVS (2011), ‘Gold age pensioners: Valuing the Socio-Economic Contribution of Older People in the UK’, pp.4-5.

4. Charles Moore, *The Daily Telegraph*, 1st July 2011.

5. Cabinet Office, *Giving White Paper*, May 2011.

Organisations like Independent Age, WRVS and Community Service Volunteers' Retired and Senior Volunteer Programme are built on the fact that older people can and do help one another. As a Select Committee submission by Age UK put it: "Later life is a time when many people wish to volunteer and make an active contribution to civic and community life: indeed **many community groups are almost totally dependent on older people's contributions**".^[6]

Not only do these older people help those they serve, beyond what is provided by the state, but also the volunteers themselves benefit from knowing they are contributing, keeping their skills alive and building new social relationships. Because of the growing trend for older people to live alone, the building of social networks through civic engagement of all kinds is particularly likely to be valuable to those involved, as well as to those they help.

This 'social capital' of networks and mutual trust was identified by influential public policy writer Robert Putnam in his *Bowling Alone*^[7] as vital and secondly as threatened in advanced economies and western cultures. Older people, because of their time and skills and relationships, may be better able than other generations to create this capital. But, because they may be retired, disabled or living alone, they may also need it more.

Part of the Big Society concept is to recognise and promote a shift towards greater empowerment of communities and extension of their responsibilities – rather than extending those of the state. This insight was already evident in the previous government's Modernisation Agenda and need not necessarily be seen in party-political terms; indeed, there are strands of 'Blue Labour' thinking moving in this direction. As a practical reality in the current fiscal climate, the time is right to find ways to do more with less state funding.

Recognising these financial realities, we consider in this report some practical examples of Big Society in action, focusing on projects that involve older people, and ask: to what extent are older people able to organise and administer themselves without significant state support and intervention? To what extent are they able to support themselves without state funding? This is not to suggest that there is no funding or organisational role for the state in Big Society but rather that these state funding and organisational roles are, at best, unlikely to expand in the current economic situation. Thus we should be looking to replicate and grow examples of Big Society that are not as reliant on direct state support, if not for philosophical reasons then at least for practical ones.

We also consider **what roles, other than finance and direct organisation, the state can perform in developing the Big Society**. We touch on the role of the state in Big Society-type initiatives for older people that might otherwise flounder because the potential benefits to those taking part are some way in the future. In these sorts of initiatives (such as the Japanese care credits schemes and the USA's Independent Transportation Network discussed in Chapter Five), volunteers contribute services today in the expectation that they will be able to use the same services themselves when they are older. Here **the state can act as an 'underwriter'**, using its authority to show that an initiative can be expected to be around long enough so that those contributing to it now will be able to claim their reward from the scheme later.

6. Memorandum from Age UK, submission to Communities and Local Government Select Committee, at <http://www.publications.parliament.uk/pa/cm201011/cmselect/cmcomloc/writev/localism/loco043.htm>

7. Putnam, Robert (2000), *Bowling Alone*.

There is another reason for pointing out the link between older people and the Big Society. For all those who are concerned about ageism, the idea of empowering older people and extending their responsibilities, instead of seeing them as passive recipients of help, is attractive. Initiatives looked at in this report, such as the University of the Third Age and the Southwark Circle of Care, do just that. Recognising older people's existing civic role and promoting more of it is part of the necessary change in attitudes as we live longer.

This report aims to show that where the Big Society already exists, much of it is created and run by older people. Whatever their reasons, older people are already extensively involved in civil society and their needs demand still deeper engagement. That benefits them, as we demonstrate from research in gerontology. As we adapt to demographic change, policymakers should encourage more of the same.

Of course we want to engage people of all ages in the Big Society: in highlighting the role of older people we are not in any way seeking to exclude other age groups. But **the people who are already making the largest contribution are older people**. That opens up great opportunities as the population ages. And this opportunity is one that should be marshalled for extension across our society. After the riots of 2011, we need more than ever to heal the fractures and bridge the educational, moral and cultural divides in our society. If we can get all the manifest talents, energy and ability of our older population gathered, we can in part focus it on intergenerational work – on creating the opportunities and platforms to enable the old to help the young, to teach them the skills and talents learnt from many, often very successful, years in business or public service.

Better understanding of how much older people already do for the Big Society can also inspire more involvement. The insights of behavioural economics – 'nudge' theory⁸ – indicate that people are influenced in their choices by what people like themselves do. For example, hotels which tell guests that people in rooms like theirs typically reuse their towels are more successful in changing wasteful behaviour than those which asked guests to be greener.

In the same way, the more we understand that it is older people who are making the running in civil society, the more other older people are likely to copy them. That may not be achieved by using messages about "this is what older people like me do". The message may be "this is what people who think ahead do", or "this is what you should do when planning your retirement", since people may not label themselves as 'older'. But whatever the branding, the message is particularly important now that those born during the baby boom are entering retirement. It should be part of society's social adaptation infrastructure to longer lifespans.

The aims of this report

By demonstrating how older people are already the bedrock of the Big Society, looking at what motivates today's older people to volunteer, and the barriers preventing them doing more, this report proposes how to attract more of them, and in particular more of those now entering retirement, to contribute.

8. See Richard H Thaler and Cass S Sunstein (2008), *Nudge – Improving Decisions about Health, Wealth and Happiness*.

In *The Pinch: How the Baby Boomers took their children's future- and why they should give it back*,⁹ the Conservative Universities Minister David Willetts has described how the generation now entering retirement has seen its life chances improve, thanks to peace, technological advances and economic growth. Nonetheless, today's older people include many on very low incomes. However, the baby boomer generation (those born between 1945 and 1965), benefiting from more generous pension schemes and rising house prices, has accumulated assets on a substantial scale. Its members enjoy better health and are better educated than previous generations. As Lynne Berry, former chief executive of WRVS, pointed out at a ResPublica/Independent Age roundtable: "We have an opportunity with the baby boomers, as they are the best-educated, healthiest and well-off at a younger age and do not need to work into old age".¹⁰

It may be that the baby boomers will contribute more than ever to the Big Society – but we need to ensure it. The *Giving White Paper* committed to "developing schemes to encourage participation among the baby boomer generation" but gave little detail. This subject can and should be taken up at the Giving Summit – one of the proposals of the *White Paper* – to be held in autumn 2011.

Of course there are exceptions. The elderly misanthrope, like Dickens' Scrooge, is a literary cliché. But that is a picture from a world where few people enjoyed long and healthy old age. For centuries, old age was a struggle by a few to hang onto their assets while managing their increasing needs, without the guarantee of a state or social safety net. The legacy of that world should not blind us to the contribution possible from today's elderly, particularly the many who enjoy a substantial measure of financial security and health.

As Lewis Wolpert, the biologist, put it in *You're Looking Very Well: The Surprising Nature of Getting Old*: "People of 75 have had a fair share of life, and many do very well looking after themselves with pleasure until much older".¹¹

More older people in the future potentially means more civic action – if we understand what the future's older people want out of it. The generation which fought in the Second World War or endured life on the Home Front often says, in the language of the time, that it has "done its bit". So it has, in many cases. But the generation born after the war has enjoyed unprecedented prosperity, and now, greater longevity than even the actuaries expected. At the same time, many are aware of the squeeze on younger generations whose members will have to pay for the boomers' unfunded pensions, while providing – or failing to provide – for their own retirement.

Perhaps it is not too much to suggest that there is an obligation, for those who are able, to make the most of their good fortune by contributing to others. But volunteering and other civic engagement has to be made attractive and the barriers removed. We concentrate primarily on volunteering, because, as we show in this report, there is a link between it and greater well-being in later life – but we think it is likely that other civic engagement is similarly beneficial. In our final recommendations, we include policy changes, possible changes in charities' practices and 'nudges' which could encourage and enable the soon-to-retire and the retired to play an even bigger part in the Big Society.

9. Willetts, David (2010), *The Pinch: How the Baby Boomers took their children's future- and why they should give it back*.

10. ResPublica/Independent Age roundtable on older people and the Big Society, 24 March 2011.

11. Wolpert, Lewis (2011), *You're Looking Very Well*.

Chapter Plan

Chapter One provides a snapshot of how the population is ageing, looks at the particular and increasing risk of loneliness and social isolation for older people and at how social contact improves health both mental and physical. It also looks at how older people are already contributing to the Big Society in terms of volunteering, civic engagement, unpaid caring and charitable giving.

Chapter Two uses research commissioned by Independent Age and from a collaboration with Gransnet, the social network site for grandparents, to look at motivations for volunteering among today's older people.

Chapter Three looks at some of the barriers to volunteering.

Chapter Four looks at future trends and how volunteering could be made more attractive.

Chapter Five brings together specific examples of 'groundbreakers' – organisations which could be considered as Big Society institutions, such as the University of the Third Age, the Japanese "Caring Relationship Tickets" scheme and the Southwark Circle of Care.

Chapter Six sets out recommendations for the future.

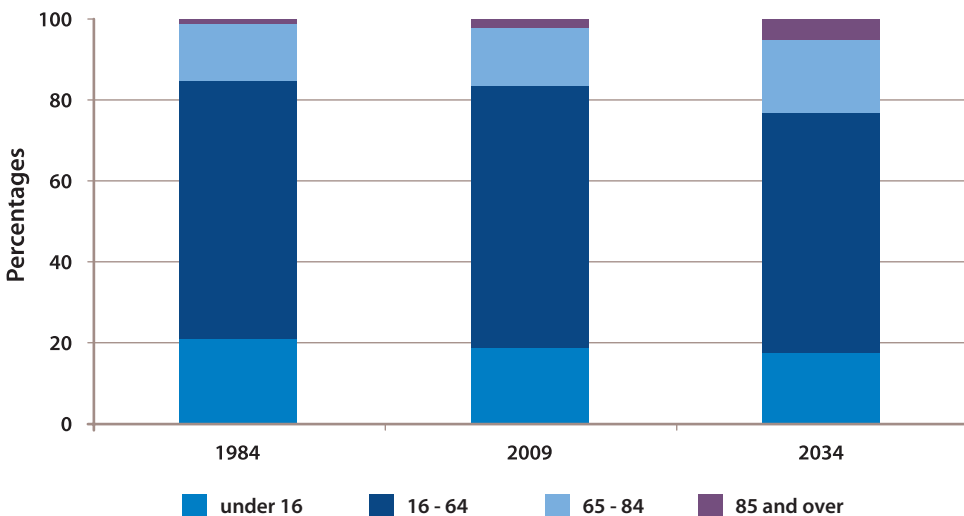
Chapter 1. Today's older people: Already the bedrock of the Big Society

The ageing of the population is typically portrayed negatively. This report takes a different view. It is inevitable with an increasing population of older people that funding pensions, health and social care will take a rising proportion of economic output. However, that we are living longer is a great achievement, the result of extraordinary successes in public health, medicine and technology. Most of the extra years will be healthy ones – healthy life expectancy is growing.

Advocates for older people naturally highlight those in need. That is not surprising, given the grim history of pensioner poverty and concerns over future provision. As the Commission on Funding of Care and Support, chaired by Andrew Dilnot, has made clear, the question of who is to pay for social care in later life has to be grappled with.^[12] It is potentially a divisive one. But without in any way downplaying the challenges of funding pension, health and social care costs for an ageing population, the reality is that an increasing number of us can expect an **increasing period of healthy years of later life**.

The ageing trend is evident across the industrialised world, as a result of prosperity and advances in medicine. The increases in life expectancy are dramatic. By 2040 people aged 60 and over will constitute 28% of the UK population, compared to just under 22% in 2007. This compares to 25% in the US in 2040, nearly 32 % in France and 39% in Germany.^[13]

Figure 1: The ageing population



Source: ONS^[14]

12. Commission on Funding of Care and Support (2011), *Fairer Funding for All*.

13. Center for Strategic and International Studies, *Global Aging Preparedness Index*.

14. ONS (2010), 'Pension Trends: Chapter 2 Population Change', pp.2-4.

But these older people are very far from simply being a 'burden'. The economic and social contribution (through taxes, volunteering, social care and spending power amongst others) to society made by people over 65 has been calculated at £40 billion and their contribution is projected to grow to £77 billion by 2030.^[15] Taxes paid by people aged 65 and above amount to £45 billion, approaching twice the total the Government receives from council tax.^[16]

The baby boomer generation is now reaching retirement. But they cannot only expect longer lives. Much of their remaining life is likely to be healthy. Healthy life expectancy has never been higher.

Life expectancy rates are set to continue to increase. Male cohort life expectancy at age 65 was 14 years in 1981 and 18 years for women. These rates are expected to rise to 25.3 years for men and 27.7 years for women by 2051.^[17] And many of these extra years will be healthy ones. In 2006, men who had reached the age of 65 could expect to live 12.9 years in good health whilst women were expected to have 14.5 years.^[18] Furthermore, men could expect to live 10.0 years and women 10.5 years free of a limiting chronic illness or disability.^[19]

Healthy life expectancy is not increasing as fast as life expectancy overall. For many people there will of course be some final years of poor health. The picture will vary regionally and by income, and lifestyle factors such as diet and smoking will also play a part. But from the perspective of those wishing to put part of their later life into contributing to society, the period of healthy life likely to be available for that purpose is increasing.

Challenges and opportunities

The ageing of the population will have profound effects on society. It has long been recognised that changes in the balance between the number of retirees and the numbers of those in work make necessary a dramatic transformation in pension provision. This report does not propose to consider the Coalition Government's restoration of the link between the basic state pension and earnings and other changes to funding retirement; nor do we intend to examine the changes to the financing of social care being proposed by the Commission on Funding of Care and Support, or estimate the resultant implications for healthcare.

However, **to understand how older people can benefit from volunteering and civic engagement** we need to look at the problems of loneliness, defined as the psychological state of feeling alone, and social isolation, the objective state of lacking regular human contact. Research over decades has found a fairly constant proportion (6-13%) of older people feel lonely often or always.^[20] As populations age, with fewer people having children and more older people living alone, this means more individuals are likely to be affected. This affects their well-being and mental health.

15. Gold Age Pensioners, above, pp.4-5.

16. Gold Age Pensioners, above, p.20.

17. ONS (2010), above, pp.2-4.

18. ONS (2010), 'Pension Trends: Chapter 3 Life expectancy and healthy ageing', pp.3-4.

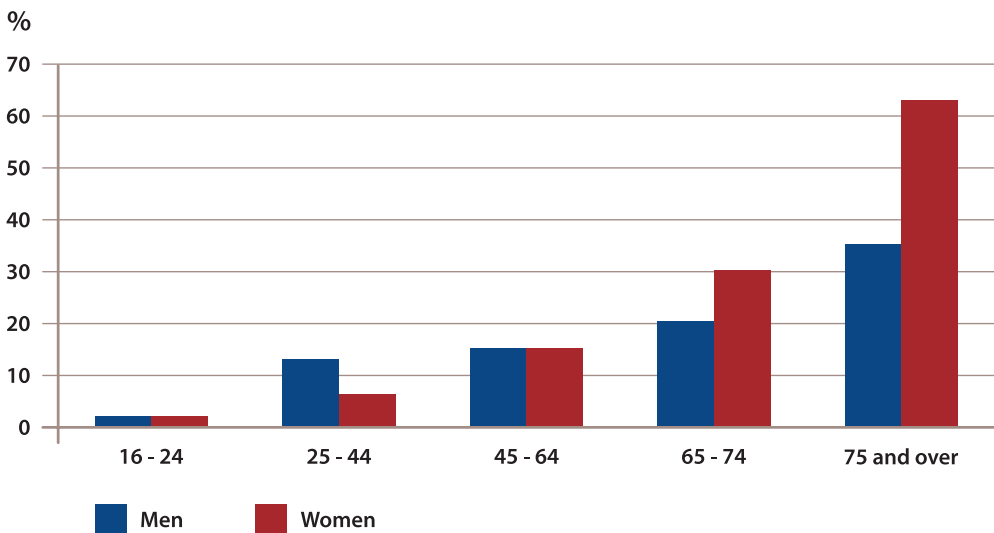
19. ONS (2010), 'Pension Trends: Chapter 3 Life expectancy and healthy ageing', pp.3-5.

20. Oxfordshire Age UK (2011), Safeguarding the convoy, p.11.

Family breakdown and increased job mobility have resulted in the social exclusion and social isolation of many elderly people, particularly, but not uniquely, in areas of deprivation: “The accumulated loss of family members, friends and neighbours – through either out-migration or death – is most likely to affect people living in disadvantaged urban contexts”.^[21]

The UK, Europe and the United States have witnessed a general upward trend in the number of people living alone especially in older age groups. According to the ONS, in 1973 9% of adults lived alone. In 2009 this group had risen to 16% in the UK.^[22]

Figure 2: People living alone by sex and age, Great Britain, 2008



Source: ONS

Research by gerontologist Christina Victor found that 17% of older people have contact with friends, family and neighbours less than once a week – indeed, 11% have contact less than once a month.^[23] In part this lack of contact can be explained by increases in population mobility with more people living in different areas of the country from their families. Research by Independent Age in 2008^[24] found that, amongst its members, distance had the most pronounced effect on an individual's contact with relatives and friends.

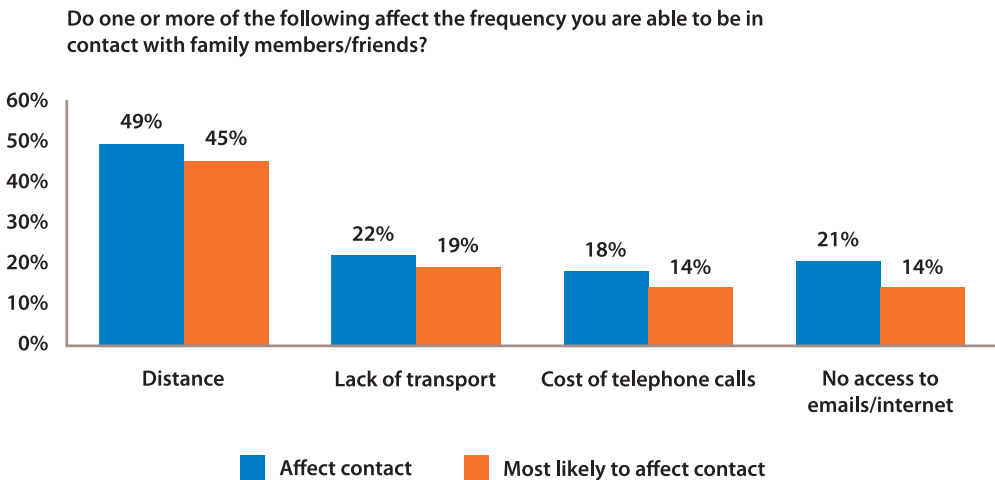
21. Ibid p.31.

22. ONS (2009), 'General Lifestyle Survey Overview', p.2.

23. Victor et al (2003), 'Loneliness, Social Isolation and Living Alone in Later Life' quoted in Safeguarding the convoy, above.

24. Independent Age (2011), Links between social exclusion, loneliness and social exclusion in older people, p.4.

Figure 3: Impact of major factors on the extent of contact with family and friends



Source: *Independent Age*

Since the 1980s there has been a decline in the number of people living with adult children before the death of their spouse, particularly in the oldest age category. **Older women in particular are most likely to live alone.** In 2008 30% of women aged 65 to 74 years old and 63% aged 75 and over lived alone, according to the ONS.^[25]

Living alone and the associated social isolation – defined in terms of frequency of social contact – are significant factors affecting health outcomes amongst older people.^[26] Along with loneliness, the lack of support in the home can pose practical problems for elderly people when it comes to living independently and receiving care after leaving hospital.

Both loneliness and social isolation can vastly reduce the quality of later life. A number of studies have made significant connections between, for example, loneliness and high blood pressure,^[27] lack of social networks and increased risk of cardiovascular disease,^[28] and low levels of social integration and increased risk of mortality from breast cancer.^[29] **Overall, research suggests that loneliness is as much of a threat to health as smoking or obesity.**^[30]

25. ONS (2010), *Social Trends*, p.16.

26. *Safeguarding the convoy*, above.

27. John Cacioppo & Louise Hawkey "Loneliness is a unique predictor of age-related differences in systolic blood pressure", *Psychology & Ageing*, 21:1 (2006), pp.152-164.

28. Kawachi, Colditz, Ascherio, Rimm, Giovannucci, Stampfer and Willett (1996), A prospective study of social networks in relation to total mortality and cardiovascular disease in men in the USA.

29. C. Kroenke et al., *Social Networks, Social Support, and Survival After Breast Cancer Diagnosis*, *Journal of Clinical Oncology* (2006).

30. *Daily Telegraph*, 16th February 2009.

Evidence shows that health and well-being can be at risk when a person is lacking in support networks, such as amongst those who do not have a partner or children of their own.^[31] By contrast, strong social networks – where practical and emotional support is readily available – have a positive effect on older people’s psychological and physical health.^[32]

Just like paid work, volunteering is a productive activity that leads to a higher maintenance of health – particularly amongst older adults.^[33] **There is clear evidence from scientific studies that volunteering benefits health.** A number of studies have examined the relationship between volunteering and health across the course of life. Those who volunteer are of better health than those who do not,^[34] according to a study which looked at the benefits from volunteering at different life stages. Another considered the role of volunteering in combating depression, a condition affecting over a fifth of men and 28% of women over 65.^[35] Another study explicitly linked volunteering to “successful ageing”.^[36]

We recognise that charitable giving, caring for family members and civic engagement of all types are also important elements of Big Society action, and we document the extent of these below. We also recognize that there may be **mixed evidence about the impact of other forms of engagement on health.** For example, the relationship between being a carer and health is by no means so obviously one-way: 625,000 people suffer mental and physical ill health as a direct consequence of the stress and physical and time demands of caring.^[37]

However, in this report **we will focus particularly on volunteering**, both formal and informal. Then, because we want to find ways in which even more older people might get involved in the Big Society, we look in Chapter Two at motivations for volunteering and in Chapter Three at the barriers.

How much volunteering and civic engagement takes place already?

Membership of political parties and trade unions in the UK has fallen dramatically over the last decades. By contrast, looking in on a frail neighbour, volunteering, raising money for charity, or civic engagement such as getting residents together to write to the council, continues to be a big part of life for many people.^[38]

31. Gray, A, “The Social Capital of Older People”, *Ageing and Society*, 29 (2009), pp.5-31.

32. E. Grundy and A. Sloggett, “Health inequalities in the older population: the role of personal capital, social resources and socio-economic circumstance”, *Social Science and Medicine*, 56: 5 (2003), pp.935–947.

33. Ming-Ching Luoh & A. Regula Herzog, “Individual Consequences of Volunteer and Paid Work in Old Age: Health and Mortality”, *Journal of Health and Social Behaviour* 43:4 (Dec 2002), pp.490–509.

34. For example, M. Musick & J. Wilson, “Volunteering and depression: the role of the psychological and social resources in different age groups”, *Social Science & Medicine*, 52:2, p 259-69; M. van Willigen, “Differential benefits of volunteering across the life course”, *Journal of Gerontology Social Sciences*, 55B:5, p S308-s18.

35. Health Survey for England 2005: health of older people IC NHS 2007, quoted in *Agenda for Later Life*, 2011, Age UK.

36. Young-joo Lee & Jeffrey L. Brudney, “The impact of volunteering on successful ageing: a review with implications for programme design”, *The Journal Institute for Voluntary Research*, 9:1 (2008), pp.21-35.

37. ONS, *Census 2001, Carers UK analysis*.

38. Department of Communities and Local Government (2010), *Citizenship Survey: 2009-10 (April 2009- March 2010) England, Cohesion Research*, Statistical Release 12, p.11.

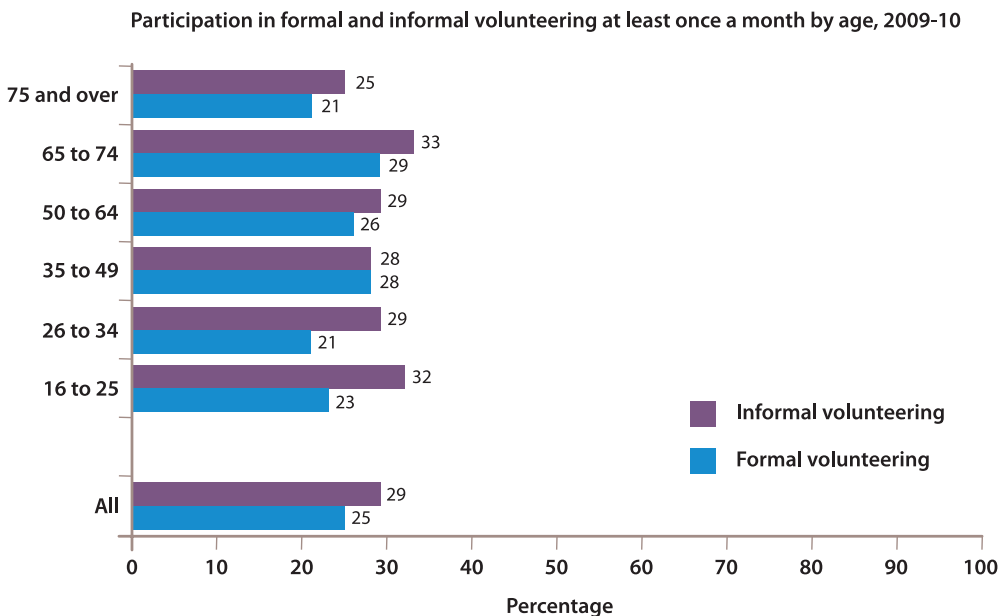
Volunteering

Volunteering is hard to define precisely but can be seen as having two forms. People volunteer informally by giving unpaid help to those outside their immediate families, or formally, through groups and organisations. These forms of volunteering can be hard to track, but it is very important to do so, particularly in some ethnic groups where this kind of mutual support is taken for granted. Alan Hatton-Yeo, chief executive of the charity Beth Johnson Foundation, has warned against underestimating the extent of informal volunteering in a 2006 report *Ageing and Social Policy*:

“Research suggests that an over-emphasis on formal volunteering may significantly underestimate the input of older people in their communities and indicates that many older people prefer the flexibility of informal volunteering which is seen as a natural activity in their locality. More broadly there is increasing discussion that, in the same way, in black and minority ethnic communities the amount of voluntary activity may be significantly underestimated because it is part of a culture of mutual support.”^[39]

So **both informal and formal volunteering can be shown to be a big part of British life**. The Citizenship Survey showed in 2009-10 that more than half the population of England had volunteered informally in the past year and 40% had volunteered formally.^[40]

Figure 4: Participation in volunteering



Source: Citizenship Survey 2009-10

39. Beth Johnson Foundation (2006), *Ageing and Social Policy – a report for Volunteering in the Third Age*, p.3.

40. Citizenship Survey: 2009-10, above, p.11.

Older people (defined here as the three over-50s groups) are a big part, though not the only part, of both our informal and formal volunteer workforce. A third of 65 to 74 year-olds participated in informal volunteering at least once a month in 2009-10. This level of volunteering continues, up to a point, into old age. About 25% of those aged 75 and over participate in informal volunteering at least once a month.^[41]

While the 1997 National Survey of Volunteering found that volunteering peaked in middle age and then declined, other research suggests that volunteering does not show a strong decline until the age of 70. And at that point the decline may be due to the policies of the organisation using volunteers rather than the choices of individuals involved.^[42]

The value of this volunteering by older people was estimated by the WRVS at £10 billion a year.^[43] That compares to an estimate for the total value of volunteering to the economy of £21.5 billion.^[44] According to the 2009 Building a society for all ages report, an increase of just 10% of over 65s' volunteer hours would be worth over £500 million.^[45]

Types of volunteering

According to a Cabinet Office report, *Helping Out*, older age groups (55 years and over) tend to volunteer for organisations that focus on elderly people (14%) and local community, neighbourhood and citizens' groups (21-22%).^[46] The 55+ age group was found to be least likely to be involved in either education or children and young people's organisations, and most likely to be involved in religious organisations such as churches, with 32% of over 65s involved in this type of activity.^[47]

Religious organisations can often provide a framework of continuity and commitment as well as substantial leadership and physical resources. This has been recognised in the £5m Near Neighbours initiative, which is aimed at encouraging productive collaboration between communities, using the Church of England's experience and parish and schools infrastructure.^[48]

41. *Ibid*, p.10.

42. *Ageing and Social Policy*, p.4, above.

43. *Gold Age Pensioners*, above, p.29.

44. National Council of Voluntary Organisations (2010).

45. HM Government (2009), *Building a society for all ages*, p.46.

46. Cabinet Office (2007), *'Helping Out: A national survey of volunteering and charitable giving'*, pp.23-25.

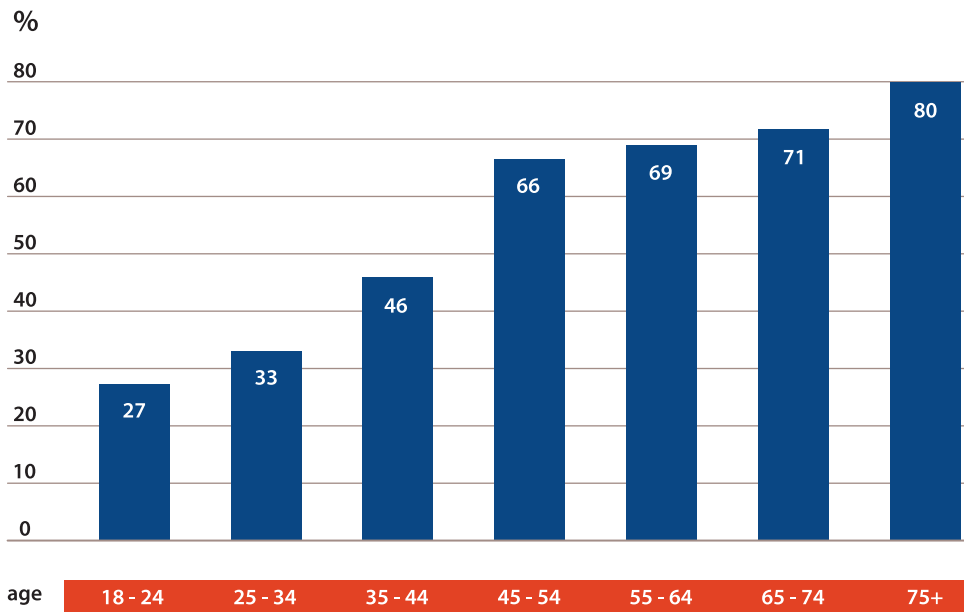
47. *Ibid*, p.25.

48. *Giving White Paper*, above.

Civic participation, consultation and activism

Even more marked than older people's role in volunteering is their **engagement in the democratic process**. As people get older they are dramatically more likely to use their ballot papers. According to the Hansard Society, in 2010 just 27% of 18-24 year-olds said they would be likely to vote in an immediate general election, compared to 80% of people aged 75 or over.^[49] Political strategists ignore this greater propensity to vote at their peril.

Figure 5: Certainty to vote by age



Source: Hansard Society

Not only are older people more likely to vote, they are also more likely to get involved in the community. The *Citizenship Survey* consistently found **high rates of civic engagement, in volunteering and other ways, ranging from signing petitions to standing as local councilors and school governors, among older people**. The table below shows results for four time periods, breaking civic engagement into three categories and including results for formal volunteering.^[50] All four activities are grouped together and compared with previous years.

49. Hansard Society (2010) Audit of Political Engagement 7.

50. Citizenship Survey, above.

Figure 6: Participation in civic engagement and formal volunteering at least once in the last year, by sex, age and disability, showing the four categories of civic participation, civic consultation, civic activism and formal volunteering for April-December 2010

Percentages England, 2007/08 - 2010		Civic Participation	Civic Consultation	Civic Activism	Formal Volunteering	All Activities			
						2007/08	2008/09	2009/10	April - December 2010
Sex	Male	35	18	10	40	62	61	59	57
	Female	34	19	11	41	64	62	60	55
Age	16 to 25	22	11	8	41	55	53	53	48
	26 to 34	33	16	8	37	62	59	59	50
	35 to 49	39	20	12	46	70	67	64	62
	50 to 64	38	22	12	39	65	67	62	62
	65 to 74	42	25	12	41	64	66	63	58
	75+	27	16	7	29	51	49	47	46
Disability	LTLI/ Disability	35	19	10	35	58	60	55	54
	No LTLI/ Disability	34	18	10	42	64	62	60	57
All		34	18	10	40	63	62	59	56

Source: 2010 Citizenship Survey

'Civic activism' refers to involvement either in direct decision-making about local services or issues or in the actual provision of these services by taking on a role such as a local councillor, school governor or magistrate. 'Civic consultation' refers to active engagement in consultation about local services or issues through activities such as attending a consultation group or completing a questionnaire about these services; and 'civic participation' covers wider forms of engagement in democratic processes, such as contacting an elected representative, taking part in a public protest, or signing a petition.

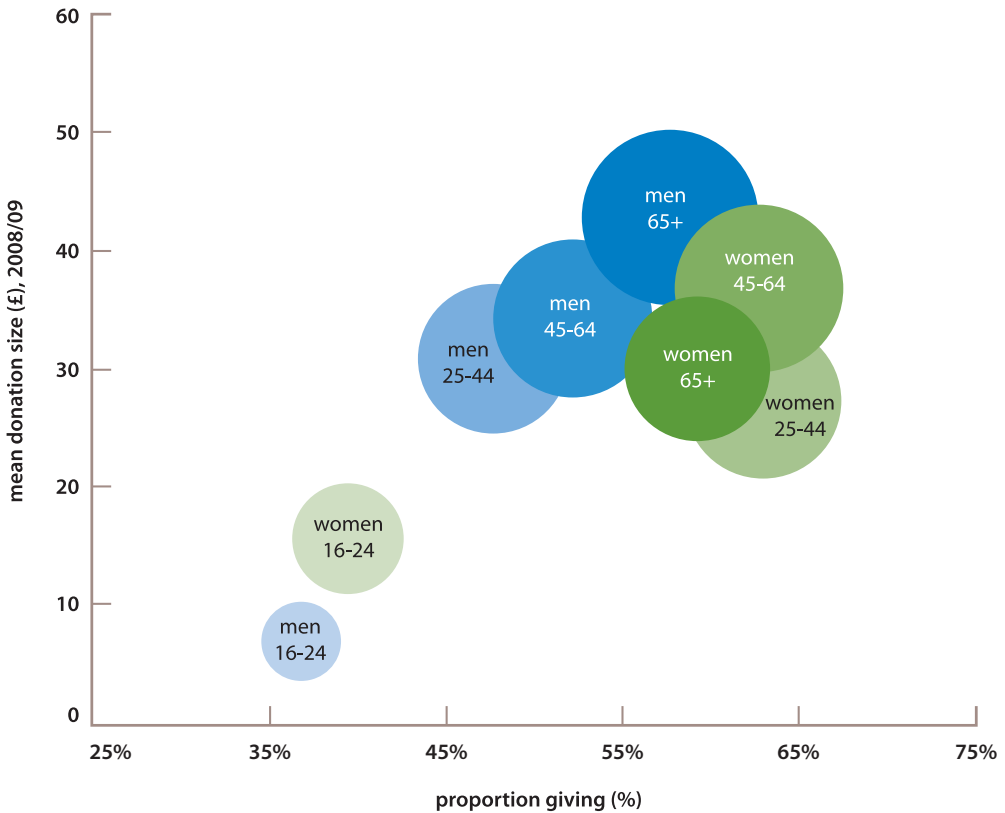
The 2010 *Citizenship Survey* shows that civic participation peaks among 50-64 year-olds, with 39% getting involved "at least once in the last year", but 65-74 year-olds are not far behind at 35%. The pre-retirement 50-64 year-old group also leads in civic consultation, with 65-74 year-olds and the over-75s ahead of the youngest groups in this category. As for civic activism, the most demanding form of engagement, the pre-retirement group and the over 65s equal the 35-49 year-olds, with the 75+s as active as the 26-34 year-olds.^[51]

51. Ibid.

Giving

A central pillar of the Big Society is charitable giving. Older people are already the largest donors to charity. According to WRVS research, older people make annual contributions of £10 billion through charity and family donations.^[52]

Figure 7: Size of average donations



Source: CAF/NCVO

Further, research by the National Council for Voluntary Organisations (NCVO) in 2008-09 – shown in Figure 7 – found that **the likelihood of giving to charity increased with age**, with the biggest proportion of people giving being the 65+ age group. In this age group 58% gave to charity in 2008-09,^[53] and they were also the most likely to be high-level donors.^[54] In our recommendations,

52. Gold age pensioners, above.

53. NCVO (2009), 'UK Giving 2009: An overview of charitable giving in the UK, 2008/09', p.6.

54. Ibid, p.6.

we propose that Philanthropy UK, the free service receiving £700,000 in government funding to encourage mass affluent and high-net-worth donors, should also promote volunteering, as those they approach may be able to give time as well as money. The same should apply to the private banks, which are being encouraged to develop high quality philanthropy advice.

In addition to charitable donations, grandparents collectively transfer large sums of money to their grandchildren, contributing, for instance, an estimated £4 billion a year in inheritance funds^[55] and £470 million to Child Trust Funds (now discontinued) each year.^[56]

Care providers: the grandparents' army

Amongst the most significant contributions older people make to society is the provision of care for disabled adult children, grandchildren and for one another. **In the UK grandparents are a 'reserve army' that steps in to meet the childcare needs of their children.** One in three working mothers receives help with childcare from the child's grandparents.^[57] A quarter of all families rely to some degree on grandparents to provide child care.^[58]

Most of this is provided by grandmothers. Mothers with fewer educational qualifications are more likely to take up this type of care, probably because they are likely to be lower earners for whom paid alternatives are unaffordable. It is children in the under-five age group – in other words those requiring the most supervision – who are most likely to be cared for by their grandparents.^[59] From April 2011 grandparents will be able to claim National Insurance contribution credits towards their state pension for looking after their grandchildren so that their parents can work (a similar credit has been established a year earlier for carers of people with disabilities). This may be an important test of whether granting credits for unpaid work has an effect, and it will be referred to in our recommendations. Age UK has estimated the value of grandparent care at £3.9 billion a year. Without it, demands on state-funded child care would be heavier. Some parents would be unable to work at all.

Care responsibilities shouldered by older people go wider than looking after grandchildren. ONS data from 2006 showed that 16% of women and 8% of men aged 50 to 64 had looked after someone in the week prior to being interviewed. Whilst the percentage of women who cared for someone dropped to 5% amongst those aged 75+, for men the percentage stayed relatively stable. Of those who had provided unpaid care, a third of the over 50s had done so on a scale comparable to full-time working, at 35+ hours of care.^[60]

55. Huber, J and Skidmore, P (Demos 2003), *The New Old: why baby boomers won't be pensioned off*, Demos.

56. The Children's Mutual, Press Release 29/09/08

57. Grandparents Plus, Grandparenting (June 2010) 'Grandparenting in Europe', p.4.

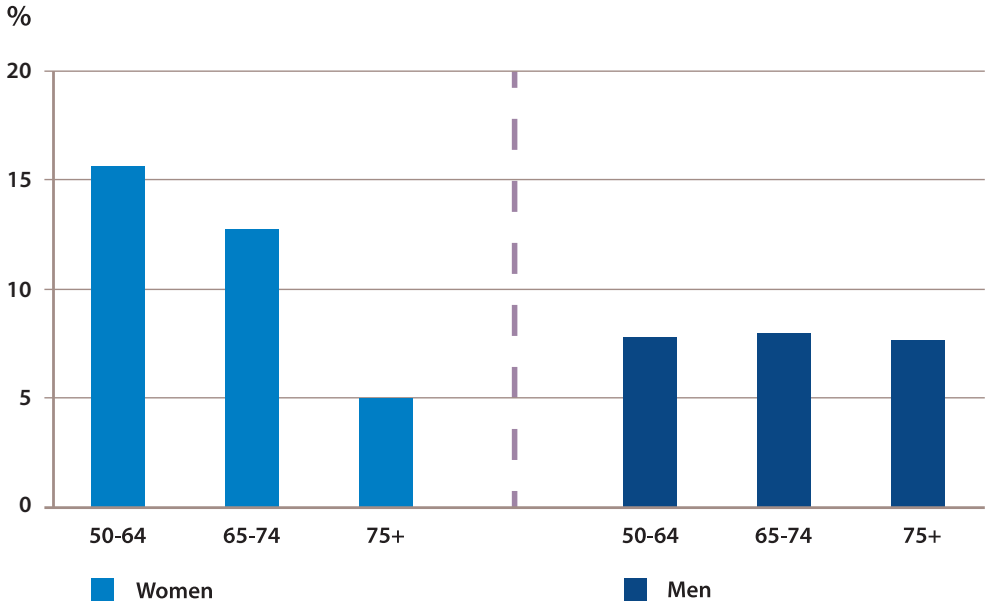
58. *Ibid*, p.5.

59. *Ibid*, p.4

60. ONS available at: <http://www.statistics.gov.uk/cci/nugget.asp?id=1268>.

Figure 8: Unpaid care

Percentage of people that provided unpaid care in the week prior to being interviewed, by sex and age, England, 2006



Source: ONS

Thus, older people are already the backbone of the Big Society. They are already heavily involved in volunteering and other types of civic engagement, and they are giving more, voting more, and providing more care than many other groups. **In principle, the more older people we have, the more Big Society activity we can hope for. But we cannot take this for granted**

Chapter 2. Why do older people volunteer? Motivations for volunteering

Shirley, who is 79, lives alone in rented accommodation and relies on attendance allowance. Her daughter currently lives overseas. For the last 19 years Shirley has worked with a worldwide organisation for addiction recovery, supporting others in person several evenings a week and making herself available by phone in the mornings. She also volunteers informally, visiting a 99 year-old friend every Monday, encouraging neighbours to meet at her flat to share phone numbers and email addresses in case of emergencies and working on a “Gran’s Day” initiative to enrich the curriculum at the local further education college. This is despite being told recently by her borough council leader that old people soon tire of volunteering! She has always volunteered. During World War Two, she says, “we didn’t call it the Big Society but that is what it was. My mother worked at the hospital and I helped push trolleys. We knew you just had to help out. It was natural in my generation to offer to help. It wasn’t anything dramatic necessarily. You were needed.”
- Shirley Davies, 79, London

What drives all that voluntary work that elderly people do? How is it that together they are able to provide services worth – as we have shown above – an estimated £10 billion a year?

Motivations vary. According to the Citizenship Survey research shown in Figure 9 below, for all age groups, wanting to improve things or help people is top of the list, cited by nearly two-thirds of respondents to the Citizenship Survey. Feeling strongly about a cause comes next. Certainly **volunteers do not see benefiting themselves as the main reason to get involved, even though that may be a consequence.**

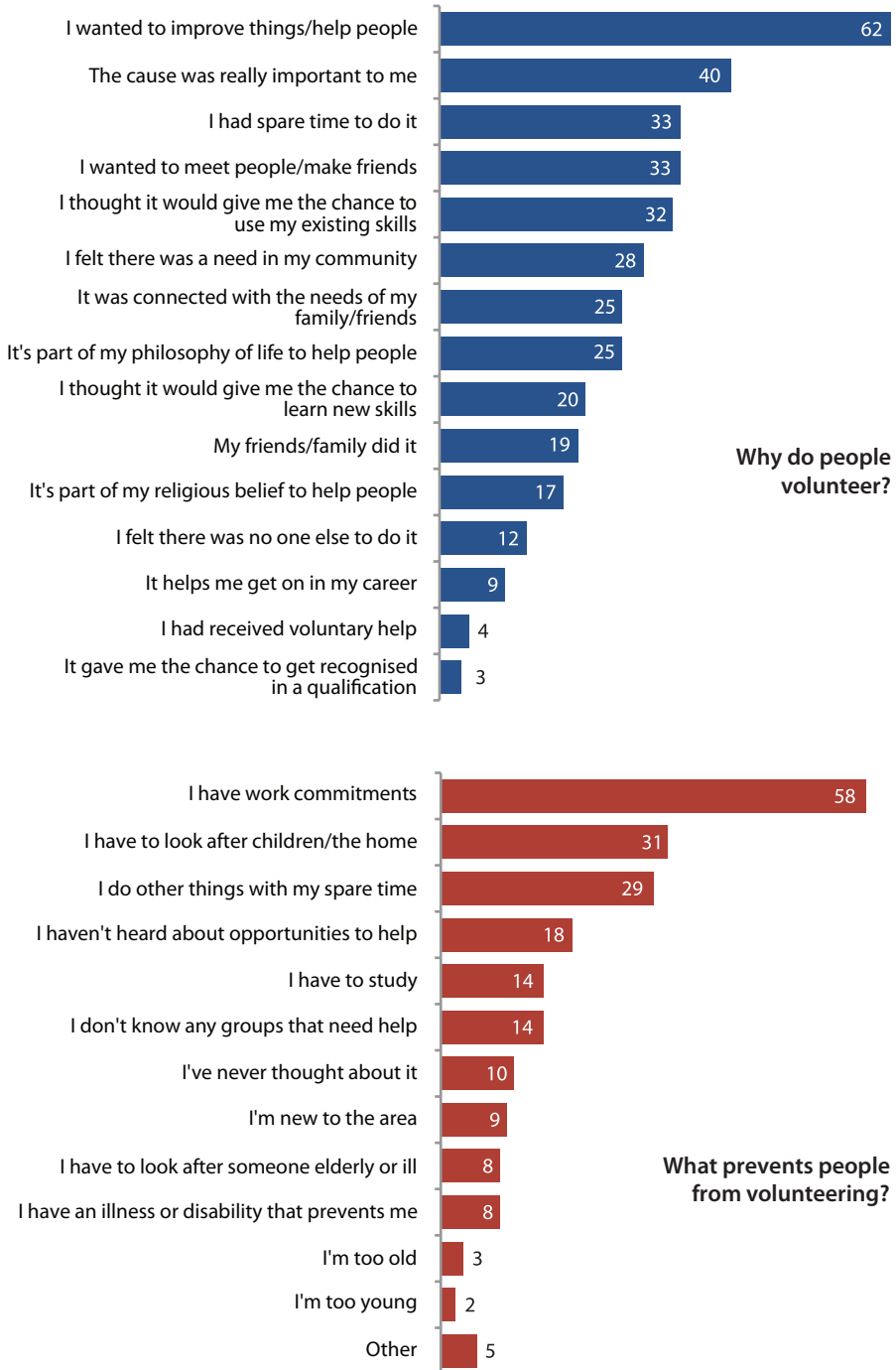
Comments from the ‘Gransnet’ forum

“I really didn’t enjoy parties, work socialising etc, I prefer people I know in small groups and being involved in hobby activities and doing volunteer work gives me a reason to be in contact with other people and widens my social circle.”

“I volunteer because I’ve been relatively fortunate, though never rich financially, all my life and I was brought up to believe that the more you get out of society the more you owe it in return — a kind of reciprocity.”

“I want to use my time; have something to look forward to; help others.”

“Having enough spare time”, which might seem more like the absence of a barrier rather than a positive motivation, was given as the third most common reason. Combined with the high proportion stating that work commitments prevented them from volunteering, clearly retired people are at an advantage when it comes to being able to volunteer.

Figure 9: Why people volunteer and barriers to volunteering

Source: Citizenship Survey

This is borne out by the breakdown of motivations by age elsewhere in this survey. Whereas younger people were more likely to start volunteering to strengthen career prospects, older age groups expressed their primary motivation behind voluntary work as concern for a particular cause that was important to them (36% and 47% compared to 23% of people aged 16-25) or because of a perceived need in the community (29% and 31% compared with 14% of younger people).^[61] Around half^[62] of those aged 65+ formally volunteered on a regular basis because they wanted to improve things or help people, and just over a third^[63] believed that helping people was part of their philosophy of life. Having spare time may not quite fit the definition of a motivation but it is clearly a key part of the picture. Further, those who are older tend to volunteer on a more regular basis than younger people and may be more able to channel their efforts toward a particular cause.^[64]

Sources on the motivations for volunteering are limited. However, analysis of older people's attitudes to wider questions can perhaps shed some light on how volunteering can fit in with their views of their own needs.

The interest and care for a cause in the local community and wider British society is often cited as a central motivation to further involvement. This is to some extent reflected in a recent YouGov poll conducted by Independent Age. **Older people were more aware of and felt more able to respond to matters that pertained to their local community than those who were younger.** When asked whether there was a current need to keep litter off the streets, prevent anti-social behaviour and crime, 46%, 36% and 30% of those over 60 responded in the affirmative – a higher proportion than younger cohorts. What is more, in this poll a higher percentage of older than younger people agreed that they themselves had a responsibility to pick up litter and to prevent anti-social behaviour and crime in their local community.

In 2009, Independent Age commissioned a programme of focus group and in-depth interviews among its members in a number of regions across the UK. When it comes to considering motivations, these responses need to be considered in conjunction with the sense of social responsibility suggested in the YouGov poll referred to above.

A total of 61 respondents were interviewed and health, crime, bereavement, benefits and other issues were addressed. The possibility of volunteering was not tackled directly. However, some of the responses suggest how it is that volunteering appears attractive because it involves social activity.

(Male focus group respondent, London) "...You have to keep active. If you sit in and look at the four walls, you are definitely going to deteriorate and the reason that I'm saying this is that I've seen it happen to friends. They won't go out."

(Female focus group respondent, Cardiff) "Volunteering brought me out and did me good. I was shy before, silly really."

(Female focus group respondent, London) "I have got a good family but when you lose your life partner, your life is very lonely. That's why when you're able-bodied you must get out among people and keep your spirits up and your mind alert."

61. Citizenship Survey, above, p.32.

62. *Ibid*, p.32.

63. *Ibid*, p.32.

64. Institute for Volunteering Research (2007), *Who gives time now? Patterns of participation in volunteering*, p.5.

What these people are saying bears out the messages expressed rather differently in the research cited in Chapter One.

Another way of understanding the motivations for volunteering comes from an evaluation of a programme called "Generations in Action", funded by the Active Communities Unit of the Home Office. This provides some qualitative evidence of how volunteering benefits the volunteers.

In this programme, Salford Business Education Partnership brought older people together with younger ones to share skills and experiences. Over 80% were aged between 50 and 70. Most volunteered in schools, supporting children with learning and also helping them develop social skills and confidence. Other activities included World War Two reminiscence performances, serving as school governors and providing hospital support.

In focus group comments, the volunteers commented on how the activities gave them a sense of worth. The activity was also intrinsically worthwhile, they believed. Several commented on how the social contact had helped them following bereavement, or redundancy from work. The structure it gave was also valued; so was the opportunity to pass on existing skills and develop new listening and mentoring skills.

One aspect of older people's current volunteering practices is that they are often focused on other older people and the local area. According to the Helping Out survey, those aged 55 and over were the age group least likely to be involved in education and in children's/young people's organisations (6-11%) but most likely to volunteer in organisations mainly concerned with elderly people (14%) and local community/citizen groups (21-22%). Younger age groups were more likely to volunteer for children and young people's organisations.^[65]

There is a downside to this pattern. Age UK reported that intergenerational contact is probably more effective in combating loneliness than contact with one's own age group (although benefits obviously come from any contact).^[66]

Currently, only 2% of 16-24 year-olds volunteer with organisations that help older people.

Independent Age is concerned that negative media attitudes towards older people might reinforce this pattern. One theme this report intends to suggest is that the empowerment through self-help advocated by the Big Society approach can help change these attitudes.

The Ageing and Social Policy report concluded:

"Older volunteers are motivated by wanting to feel they are useful members of society, to put something back in to their community, to meet new people and to pursue learning and personal growth. There is also an incentive to fill the void left by retirement but this may be countered by the increasing leisure opportunities and family responsibilities of older people."^[67]

To conclude: older people's reported reasons for volunteering, the desire to help others and support good causes, seem to be underpinned by a desire to remain active and keep up skills and a social life. The belief that volunteering will help in this way is, as demonstrated in Chapter One, borne out by gerontological research.

65. Helping Out, above.

66. http://www.ageuk.org.uk/documents/en-gb/forprofessionals/evidence%20review%20loneliness%20and%20isolation_pro.pdf?dtrk=true

67. Ageing and Social Policy, above, p.6.

Chapter 3. Breaking down barriers to volunteering

What stops an individual volunteering when many of his or her contemporaries do so? The Citizenship Survey chart shown in Chapter Two puts 'work commitments' at the top of the list, cited as a barrier by 58% of respondents. Looking after children or the home was cited by nearly a third. Having other things to do with spare time was cited by 29%. After those factors, a variety of reasons were given. These included not knowing about the opportunities to help; needing to study; or not having thought about it. Having to look after someone elderly or ill, and having an illness or disability, was cited by only 8%. Only 3% said they were too old.

Those working in the field warn that increased caring responsibilities may reduce the time available for formal volunteering. High rates of family breakdown have an effect. Grandparents are much more likely to provide day care for children in families where parents are separated than in families where the parents live together. Increased life expectancy for people with physical disabilities and learning difficulties will for some people extend caring responsibilities into the years from 50 to 70.^[68]

We think that a useful way of looking at the potential barriers to volunteering is to break them down into four key areas:

- lack of skills;
- absence of responsibility (meaning that the individual does not feel it is his or her responsibility to get involved);
- lack of time;
- lack of opportunity.

Skills

Clearly all volunteers need skills appropriate to the role they are expected to carry out: a Samaritan without listening skills is not an asset but a risk. **However, skills can be taught and volunteer training and development is now at the heart of many voluntary organisations.**

Some volunteer roles require a high degree of specific expertise and volunteers can only realistically be recruited from among professionals with these skills already. *Médecins Sans Frontières* (Doctors without Borders) deploys around 3,000 specialist medical staff every year in more than 60 countries, providing healthcare in emergencies and war zones. However it also recruits people with a non-medical background to fill a variety of support and coordinator roles, and there are many volunteer roles in other organisations that require more general skill sets. In fact, Community Service Volunteers' Retired and Senior Volunteer Programme ('RSVP') oversees activities ranging from carrying out non-medical tasks in surgeries to museum work to gardening to bicycle repair, and **makes a point of refusing no-one who applies.** If everyone has skills which are capable of being used to benefit the community on a volunteer basis, the barrier may be the problem of matching an individual to an opportunity than a skills problem as such.

68. *Ibid*, p.7.

To what extent is age itself an issue in ability to volunteer? While some volunteer opportunities require basic office skills, those now retiring are likely to have used computers and email at work. That is a key difference between them and many of the ‘older old’, today’s over-75s. That means the range of work they can do is wider and also that they may well want to keep those skills alive. Those with higher-level skills may feel wasted on simpler tasks, and self-esteem may suffer.

The *Ageing and Social Policy* report also supports this view, criticising organisations that offer “a limited range of tasks based on ageist assumptions that can be both limiting and demeaning”.^[69] Given that one of the motivations for volunteering is to maintain skills, and that having skills is important to self-esteem, this is plainly an area at which charities need to look hard. And just as the profile of the workforce has changed to become more white-collar in recent decades, so the opportunities for volunteers need to change. We look at this more closely in Chapter Four.

Some in the voluntary sector have suggested that age restrictions imposed by insurance companies have forced organisations using volunteers (‘host organisations’) to rule out using over-70s. The *Ageing and Social Policy* report suspected, however, that the root of the problem was ageist assumptions within the organisations concerned, with insurance problems being used as an excuse.^[70]

Lord Hodgson’s Independent Task Force on red tape and civil society, in its 2011 report *Unshackling Good Neighbours*,^[71] included in its proposals a call for the insurance industry to clarify these issues. In our recommendations, we call for a joint charity ‘myth-busting’ publicity campaign to allay misplaced fears about insurance and other questions of legal liability and regulation for volunteers and charity trustees.

Responsibility

Denise Wilkinson, former director of RSVP, has observed that volunteers were hard to find in Eastern European societies because those who had grown up under communism felt they had been made to contribute to their countries enough already.^[72] By contrast, the YouGov survey for Independent Age, referred to in Chapter Two, found that **older people were particularly ready to say that tackling problems in their area was their responsibility, not that of the state.**

Clearly there will be some in the UK who take the view that helping the community is not their responsibility. There are, of course, profound philosophical questions at stake here. Where the boundary lies between state, community (however defined) and individual responsibility for others’ needs involves a series of questions on which there is limited political and moral consensus. Even in a modern liberal democracy, opinions about the extent of mutual obligation vary widely. Some believe that “no man is an island, and every man’s death diminishes me”. Others embrace extreme individualism. And some limit their sense of obligation to a particular locality or ethnic group.

69. *Ibid*, p.4.

70. *Ibid*, p.6.

71. Cabinet Office (2011), *Unshackling Good Neighbours: Report of the Task Force established to consider how to cut red tape for small charities, voluntary organisations and social enterprises.*

72. ResPublica/Independent Age roundtable on older people and the Big Society, above.

But adding to these philosophical differences, there is an issue about **lack of understanding as to who is responsible** for different tasks. In winter 2010, Independent Age found that nearly half of people expected their local council to clear the snow and ice from the pavement in front of their house. Yet councils have not gritted residential pavements for many years (if they ever did) and none of 20 councils surveyed by Independent Age planned to grit anything other than main arterial roads. Independent Age raises the question: if residents understood this reality, would they be more willing to take responsibility and perhaps act not just for themselves but for elderly or disabled neighbours?

Some recent evidence does suggest a **willingness to take on more responsibility**. A recent survey of the UK workforce found that 54% of respondents felt it was important for them, as individuals, to contribute to their local community.^[73] A PoliticsHome survey found in April 2010 that a majority of people (55%) felt that there should be more community involvement and less state involvement in improving the quality of life in the UK.^[74]

Certainly the evidence from Independent Age's YouGov poll, referred to in Chapter Two, suggests that older people in particular feel strongly about taking responsibility. In addition, the respondents to Independent Age's 2009 focus groups complained about what they saw as the reluctance of their fellow citizens to take care of their local area:

(Female focus group respondent, Cardiff) "Years and years ago, I used to live in a long street, and when you came out of the house, all you would see was a perimeter outside every house, where the mothers had been scrubbing – up that road that's all you'd see, circles outside every house. And I mean you could depend on any person if you were ill, mother would say, 'pop in and ask what she'd like'."

Even those who were socially active in their local area observed a decreased sense of community:

(Female focus group respondent, Cardiff) "Oh, I spend all my time in the local community! I mean I go swimming, I go dancing, I walk miles, I meet friends, we go for lunch and everything. But the actual community thing of the streets and little areas has gone."

The challenge is to translate this dissatisfaction with the current perceived state of affairs into more widespread active citizenship, soldering together a realistic understanding of the services that can be delivered by the state and an awareness of the benefits of volunteering and civic engagement to the individual taking part.

73. Brand Democracy (2011), *Big Society & Harnessing the Power of the UK*, February 2011.

74. http://www.politicshome.com/uk/article/7869/the_big_society_nice_ideabut_who_will_participate%3F.html

Time

It is a commonplace fact of modern life that we are time-starved. Certainly there is a perception that the UK has the longest working hours in Europe, and the work-life balance movement has evolved in response to this view. **A Henley Centre report in 2009 said that two thirds of the population felt that they did not have enough time to get things done.** Given the scale of the problem, it is not surprising that “having time” featured in the Citizenship survey as the third most important “reason” for volunteering. It should by this stage go without saying that older people, often retired and less likely to face 24/7 childcare responsibilities, have more to offer; but responsibilities for grandchildren, disabled adult children and partners may, for some, be a significant barrier.

Notwithstanding this evidence, **“I haven’t the time” can also mean “I don’t see it as a priority for me”.** The *Volunteering for All* report contrasted the time spent volunteering by some groups with the large amounts of time spent watching TV.^[75] It may be “lack of time” can be overcome by greater willingness to engage, an increased sense of responsibility, by making volunteering more enjoyable or simply by a recognition that without personal action important things will not get done.

Opportunity

By ‘opportunity’ we mean the awareness of *specific* volunteering roles or action that a person could take up. I may be interested in the idea of becoming, say, a volunteer befriender, but if there are no befriending schemes in my area (or I’m not aware of them), then I may never act on my interest. We also include here any administrative barriers that prevent a potential volunteer from following up a volunteering opportunity.

Information and asking is critical. Not knowing about the opportunities featured as a significant barrier to volunteering in the *Citizenship Survey*. According to the *Helping Out* survey, two-thirds of current formal volunteers (66%) got involved through word of mouth, and 20% got involved because they had previously used the services of the organisation. The third most common prompt was seeing the opportunity advertised in a leaflet or poster (15%).^[76]

Interestingly, those over 65 were only a third as likely (6%) to have heard about volunteering opportunities through a leaflet or poster compared to the average of all other ages (19% - excl. 65+). They were less than half as likely to have been able to hear of such opportunities through a local event (3% compared to a 7% average of all other ages).

In the *Ageing and Social Policy* report, it is recognised that volunteers are often recruited by word of mouth, restricting the pool to those groups who are already involved.

Independent Age’s qualitative research found some respondents were at a significant advantage because of their professional backgrounds and volunteering work.

75. Institute for Volunteering Research (2004), *Volunteering for All? Exploring the link between volunteering and social exclusion*.

76. *Helping Out*, above, p.39.

(Female focus group respondent, Newcastle) “It’s not terribly difficult for me because of working with Victim Support. I’ve got a lot of information in my head or written down on where to go. I can usually find the avenue that I need.”

Clearly charities using volunteers need to ensure that they have the right communication strategy to recruit volunteers. We include recommendations for charities and heritage organisations, pension providers, employers and government to play a part by alerting those with whom they are in touch to the information gateways that already exist.

Other potential barriers include the need for Criminal Records Bureau checks. These issues, and others such as liability risks and increased insurance cover for motorists using their cars for volunteering, were considered in depth in *Unshackling Good Neighbours*,^[77] the report of the task force led by Lord Hodgson, so we do not propose to re-examine them. The Protection of Freedoms Bill now going through Parliament includes measures to reform the CRB regime. However, a recent submission from the Conservative Policy Forum to the Minister for Civil Society suggests that **concerns about liability and health and safety issues remain widespread**.^[78] We therefore suggest a ‘myth-busting’ joint campaign by charities to lay these worries to rest wherever possible.

77. *Unshackling Good Neighbours*, above.

78. <http://www.conservativepolicyforum.com/sites/www.conservativepolicyforum.com/files/>

Chapter 4. Trends in volunteering and civic engagement: How to do more

As Alan Hatton-Yeo has written in *Ageing and Social Policy*:

“...in terms of volunteering by older people the situation, on the surface, looks promising as older people will be ageing more positively, will live longer and will make up a greater percentage of the population. In theory this could lead to increasing numbers of older people volunteering.”^[79]

However, this cannot be taken for granted. Although it might be expected that the baby boomers will be ready to volunteer, since on average they enjoy greater health, affluence and healthy life expectancy than previous generations, they could disappoint us.

The state of the volunteer economy is mixed. **Overall the average amount of time spent by individuals volunteering decreased from 16 hours a month in 1997 to 11.9 hours by 2005.**^[80] Twenty-five per cent of people reported that they volunteered formally at least once a month in April-December 2010, a lower rate than at any point between 2001 and 2007-08 (when it was between 27% and 29%), although unchanged from 2008-09 and 2009-10. On the other hand, many charities are currently reporting an increased demand for voluntary work as younger people in particular adjust to the reality of youth unemployment.

The structure of volunteering is also changing, with increasing demand for ‘episodic volunteering’, i.e. volunteering opportunities that are short-term or one-off activities. Long-term commitment to organisations may be decreasing.^[81]

Another factor that will need to be catered for is that fact that many people are working past retirement. Employment figures for those over 65 have rocketed over the past decade, now representing 870,000 members of the current work force, compared to less than half this amount in 2001 (412,000).^[82] The abolition of the Default Retirement Age and the banning of forced retirements are expected to boost these figures further. On the other hand, increasing life expectancy means that the number of years in retirement is also rising – but they will be happening later in the lifespan. Organisations using volunteers may have to build more flexibility into their schedules to take account of the fact that some willing and capable participants in their programmes may still have work responsibilities at least some of the time.

We sought views on these and other trends from our roundtable participants and from David Wood, chief executive of Attend. Attend is successor to the National Association of Leagues of Hospital Friends and now the support organisation for volunteer groups in health and social care. He noted that some of his member organisations were resistant to using students because they were available only 30 weeks of the year for three years. In the future, that might look like a remarkably high level of commitment.^[83]

79. Ageing and Social Policy, above, p.3.

80. NCVO, Trends in Volunteering, at <http://www.3s4.org.uk/drivers/trends-in-volunteering>

81. Ibid.

82. ONS (2010), “Older people in the labour market: More are staying in work.”

83. Correspondence with author.

Clearly it must be a priority for organisations using the services of volunteers – ‘host organisations’ – to understand what they can do to make volunteering more attractive. As WRVS’s Lynne Berry put it at the roundtable, the baby boomers: “have benefited from things like the NHS and free education but have been brought up on an ideology of choice rather than one of the collective good. So the notion of choice may backfire and people may choose not to volunteer unless we make it attractive for them.” David Wood contrasts the example of an over-60, comfortably-off country woman who leads one of his member organisations and describes herself as “born to do this” with slightly younger women for whom it is natural to be working full-time in their 60s.

WRVS’s experience is that it is important to recruit volunteers into areas where they can use the skills they developed in the workplace: “We recruited newly retired people into roles they were previously doing such as retail. We were in a position where our volunteers were getting older and we turned it around through changing the roles we offered. It has brought the age of volunteers down by 10 years”. Ms Berry adds:

“Many volunteers say they want to do more than we ask of them. WRVS is developing new mechanisms of engagement and development. This is as important for older people as for younger people – their volunteering career with WRVS could easily be for twenty years. They want to keep learning and developing and it is vital for WRVS that they do so, so that they can adapt to delivering, and contributing to the development of new services.”^[84]

One Gransnetter’s comments made this point sharply: “After retiring from 30 years of nursing and senior NHS management I thought I would be volunteering but have met with such condescending attitudes at enquiry and interview stage where I have been treated as an imbecile, at best, because I am retired (I’m only 58). No one seems to want to use my extensive skills. I don’t want a position of authority but I would like some responsibility.”

David Wood emphasises that volunteer management and development is a whole human resources discipline of its own. For example, Attend helps volunteer organisations give accreditation in the form of NVQs to those who volunteer with them. “You have to recruit and retain, carry out induction, training, monitoring and rewarding, whether with medals or parties. Volunteers are expensive.”

However, he doubts whether older volunteers are interested in acquiring accreditation. **He also warns that when organisations assess what skills would-be volunteers have, it is important not to impose any more paperwork than necessary.** Hospital visitors, for example, already have to have CRB checks, a medical, induction and references. He would be reluctant to see a formal audit of skills, intended to uncover the ways in which a volunteer might be able to contribute. He and Lynne Berry agree that audits of skills when a volunteer joins may not reveal everything they can do. “Volunteers sometimes want a change from work after retirement and only later decide that they wish to be stretched more,” Ms Berry comments. David Wood quotes from his organisation’s experience: “In the beginning, it can be: ‘I might have been a partner in Coopers and Lybrand, but as a volunteer I want to play shop.’”

84. Volunteering for All?, above.

One challenge for host organisations is to fit in the type of volunteer who wants a short-term commitment, with those with more settled lives who may be prepared to commit for longer.

The *Volunteering for All* report referred to the inflexibility of organisations which required, for example, two full days a week from volunteers who were unable to offer mornings.^[85]

In order for volunteers to get the most out of their work, they may need progression and development as much as those in paid employment. Many may not want as much responsibility as they had in the past, as David Wood notes above, but they do want some.

This can create tensions with paid staff. Alan Hatton-Yeo of the Beth Johnson Foundation draws on his experience of organisations where there is a trend towards the use of professional staff, partly as a result of growth but partly at the expense of volunteers. There is a danger that staff can starve volunteers of opportunities to expand what they do, for fear that paid jobs will be put at risk. “If you empower your volunteers too well, you do yourself out of a job.”^[86] At his organisation, this risk is avoided because it does not run services. Where that does not apply, however, ways must be found to give staff, particularly those linked to temporary funding, the necessary reassurance that their positions will not be threatened if volunteers’ roles are extended.

This insight was borne out by comments from contributors to the Granset forum.

“I am wary of taking people’s jobs – or helping private providers ‘tick boxes’ whilst they make a profit.” Female long-term volunteer, 59, East Midlands

Another Gransetter, who tried to volunteer in a local charity shop, said: “I completed the application form and gave all the relevant references, etc, and they never even took up the references or got in touch with me again. Was I too qualified? Did I understand the business better than the manageress? Was my CV threatening to her?”

David Wood feels the problem of tension between paid staff and volunteer staff can be overstated. He cites examples from his own work in the hospice movement where volunteers and paid staff worked side by side at reception desks and in kitchens.

In the longer term, if more organisations relying heavily on volunteers choose to bid for contracts from local government and other agencies, their work may be governed by service level agreements. Lynne Berry would like to see the chosen indicators and targets in the service level agreements include some that relate to the wellbeing of volunteers, particularly in terms of their capacity, as well as measures of their contribution.

Clearly more work needs to be done to understand what drives volunteers and how to make the most of older ones. This task is urgent. **Charities need to match volunteering opportunities more closely with the skills and status demands of the generation beginning to retire now,** since it is a group that is used to exercising a high degree of personal choice. In *Volunteering and the Third Age*, it is suggested that the baby boomers’ greater use of the internet, and their use of cheap flights and second homes – owned by more than 600,000 people – may compete with their readiness to volunteer and participate.

85. Ibid.

86. Author’s interview. 23 June 2011.

“I have seen people who retire enjoy it for six months, getting the builders in and catching up with all the jobs, but then thinking: I have nothing to do, I am not being asked for advice as I was at work; and becoming very withdrawn, even depressed. So (personally) I’ll carry on with my hospital volunteering and fundraising for the day centre. But the people with second homes, they are constantly going backwards and forwards. Then they find family and visitors don’t necessarily come out to their overseas home. It becomes a chore. Will they then get into things like volunteering?” Lesley Gray, 50s, London, catering school principal and informal and formal volunteer

Both government and the charities with responsibilities in this area need to consider what they can do to keep the supply of engaged, satisfied volunteers in good shape. **One option is to create incentives for volunteering and civic engagement.** In Chapter Five, we look at schemes such as the Japanese ‘Caring Relationship Tickets’, the American Independent Transportation Network and the Southwark Circle of Care, which to varying degrees allow volunteers to create credits as rewards for what they have contributed (although with the Circle of Care this is not the core of the scheme).

These ideas prompt a mixed response. Since the 1970s, Shirley Davies, the prolific volunteer quoted in Chapter Two, has believed volunteers should receive a credit. “Back then I tried to get the government to adopt the idea of a stamp, like a Green Shield stamp, which you could set against your husband’s tax if he was earning and you were volunteering. I still think that would help.” Certainly most charities using volunteers attempt to cover expenses, though not all volunteers choose to claim. But what is envisaged here is a formal credit in return for time put in. This is not too great a leap from the recently introduced national insurance credits for carers and grandparents referred to earlier. In our recommendations we suggest that any incentivising effects of these are measured to inform the debate about credits for volunteering.

In answers to consultation on the *Giving Green Paper*, some respondents “were uncomfortable with timebanking schemes which offered financial incentives for volunteering”.⁸⁷ Similarly, some Gransnet forum participants were strongly against the idea of any payment.

“When labour is rewarded financially it becomes a job of work and to pay volunteers (presumably a nominal sum) is highly likely to increase unemployment. In my view it would be a back door way of getting labour on the cheap.” Female, 57, Devon

“The idea with voluntary work is that you do it without the thought of actual reward...just the warm smug glow from doing it...For it to go towards your eventual elderly care ‘budget’ might mean some folks do it most begrudgingly and therefore making it all pretty miserable for those who work with them.”

That said, the idea of mutual support and mutual obligation, even if not formalised into timebanking, is, as we have suggested, central to the idea of the Big Society. It could also help combat the ageist attitude that older people are simply passive recipients of care.

87. Giving White Paper, above, Consultation Summary.

Chapter 5. Groundbreakers: Existing examples of Big Society action initiatives involving older people as participants and service users

In the Introduction we said that one of the problems of communicating the idea of Big Society is that it is seeking to define **ways of behaving that already exist**. Developing Big Society is about building on these examples, not starting from scratch.

In this chapter we look briefly at four initiatives, from the UK and much wider afield. **These schemes share an assumption that all parties gain from better social contacts, relationships and participation in society**. As one might expect, all feature older people extensively as volunteers and often as users of services as well.

In considering these schemes, we have assessed them against the definition of Big Society cited earlier by ACEVO as one in which “individuals and communities have more aspiration, power and capacity to take decisions and solve problems themselves”. **In particular we have looked at the extent to which they use volunteers and are self-funded and self-organised**. By self-organised, we mean that the direction of activities is decided within the organisation itself rather than being led by local or national government. By self-funded, we mean that they do not rely on state funding to exist. In applying this criterion, we are not saying that state funding is of itself a bad thing. That debate goes well beyond the scope of this publication. Rather we are recognising the commitment to a reduction in public spending by all the main political parties and, of course, the reality of the current coalition government’s austerity programme. Put simply, those activities that require less state support are more likely to be put into action and to survive.

We are also recognising explicitly that the role of government in the Big Society is not simply about funding. In particular, we note the ‘underwriting’ role that the state has the potential to play. Some, such as the Japanese care credits scheme, promote future savings in currencies other than money by storing up credits for the giver’s own future. So although today’s volunteers are not necessarily older people, they are helping their older selves. We think that an important element in the success of such schemes will be the extent to which people are confident they will still exist in 20, 30 or 50 years’ time. We see the state as well equipped to help provide this confidence.

1. ‘Caring Relationship Tickets’ (Japan)

Origins and context

The Sawayaka Welfare Foundation was formed in 1991 by Tsutoma Hotta, a retired former Minister of Justice, as a private volunteer organisation. It was responding to the fact that a fifth of Japan’s population is already over 65, making it the most elderly in the world. Though there is a long tradition of family care for the elderly, typically relying on daughters-in-law, this is under pressure. State spending has also been under pressure from the Japanese recession, lasting two decades after the collapse of its credit boom in 1990. In addition, following the perceived failure of the government to cope with the aftermath of the Kobe earthquake in 1995, Japan has seen the development of a spontaneous grassroots volunteer movement towards self-help.

The schemes

Sawayaka Welfare Foundation created the concept of 'Hureai Kippu', which can be translated as 'Caring Relationship Tickets' (or simply 'care credits'). The system allows a volunteer to 'bank' the hours they spend helping an elderly or disabled person in their personal 'time account'. These credits, the amount of which can vary depending on the type of task carried out, are stored. They will be made available to that individual later in their own life, or they can be exchanged for services or transferred to someone else.^{[88], [89]} **The system has therefore been privately funded and organised but with the explicit backing of the state.**

The scheme is one of more than 600 'complementary currency experiments' in Japan. These are agreements within a community to accept something other than legal tender as a means of payment.^[90] Older people receive services 'in kind' rather than paying for them or receiving them directly from charities.^[91] The credits are distributed and managed by hundreds of non-profit organizations. There are two clearinghouses that can send credits from one side of Japan to the other. A total of 478 local institutions have been set up. Comparisons of Hureai Kippu to other alternative currencies, such as those which pay interest on loans in the form of crops, or give discounts to members, suggest that Hureai Kippu has been the fastest growing.^[92]

'Atarashi kokyo' has furthered this system. It was launched in June 2010 in an attempt to continue to alter the relationship between citizens and the state and literally means 'new public'. Anyone can earn a 'credit' by helping an older person in their neighbourhood, which can be used against care of their own parents in another geographical area. Individuals can also help the elderly in care or nursing homes to earn points against their own long-term care insurance contributions.

These schemes reduce the amount of time spent in hospital after a medical problem and can also lengthen the time an individual is able to remain independent at home. Not only does this reduce the costs of care, it also improves quality of life.^[93]

Is this Big Society?

The problem with evaluating Hureai Kippu and Atarashi kokyo is clearly that they have not been in existence for long enough to show conclusively whether credits stored up for the future will be honoured. The Sawayaka Welfare Foundation does not log the total number of participants or the hours created, let alone the funding basis.

In principle, though, the schemes have the hallmarks of Big Society as we would see it. They rely heavily on volunteers (albeit volunteers who may expect to 'bank' the value of their volunteering for current or future use). They are self-organised but also enjoy explicit state support, underwriting the value of the credits. The balance of volunteers to paid staff is clearly high. Funding is private, though there is little data available. Finally, outcomes in terms of standards of care are reported to be good.

88. Kent, D (2001), 'Japanese Health Care Currency', available at <http://alt.economics.scoop.co.nz/?p=644>.

89. Lietaer, B (2004) 'Complementary Currencies in Japan Today: History, Originality and Relevance'. *International Journal of Community Currency Research*. Vol.8, pp1-23.

90. *Ibid.*

91. Lietaer, B (2001), 'The future of money: A new way to create wealth, work and a wiser world'.

92. 'Complementary Currencies in Japan Today', above.

93. Lietaer B, Hallsmith G (2006), *Community Currency Guide*. Global Community Initiatives.

Is this relevant to the UK?

Possibly. Timebanking (as it is described here) is not a totally new concept in the UK. The SPICE scheme in south Wales, which is to receive £400,000 from government, resembles a time bank in that it has rewarded over 5,000 volunteers with discounts from local businesses. The Royal Borough of Windsor and Maidenhead is also to fund a pilot scheme of this kind.

An even more direct comparison is with Care4Care, an initiative being developed by Professor Heinz Wolff of Brunel University as an alternative way of providing care and support to older people. The idea is that within their community, people (usually) over 50 will be encouraged to perform care and support tasks for neighbours within a reasonable walking distance. The time invested in these actions will be credited to a personal care and support account (like a bank account). The balance on the account will give the individual who has invested their time in providing care for others an entitlement to care and support when they need it later in life.

2. Independent Transportation Network (USA)

Origins and context

Independent Transportation Network (ITN) was started in Portland, Maine, in the early 1990s by a social entrepreneur, Katherine Freund.

Every year over a million American over-70s cease to drive and become reliant on others for transport. The number is growing and 3.6 million senior Americans stay at home every day, in part because of transport problems.

The scheme

ITN describes itself as the first and only national not-for-profit organisation for the senior population. It combines specialist software, to handle the logistics, with grassroots support and the backing of businesses and health providers who want to help customers to be able to reach them. There are now 22 ITN affiliates across the United States.

Older and visually impaired people are able to trade their cars, which they may no longer choose to or be able to drive, for travel in the cars of trained volunteers. There is a fee for the rides, though it has been relatively small, and there is a road scholarship programme for low-income users.

The ITN Rides software allows volunteer drivers to contribute to an elderly person's credit – perhaps that of their own parents if they live in a distant city – by driving others around in their locality. Alternatively, they can store their own credits for their own future transport needs when they are older, or they can buy gift certificates for their relatives which transfer credits to those relatives. The credits are honoured at any ITN in the country. The scheme is cashless and aims to be as customer-friendly as possible. It is available on a 24/7 basis.

Volunteers can donate the credits they 'earn' to the scholarship programme if they so choose, rather than banking them for their parents or their own future use. Community organisations can use the network to transport members and receive a convenient monthly bill. Community group volunteers can also put their credits into a group account for the community's older people.

Because lack of transport keeps so many elderly people at home it is attractive to many businesses to support the scheme. ITNAmerica estimates the impact to the local business community of one new ITN affiliate at between \$300,000 and \$500,000 a year. The insurance company Liberty Mutual, which has an interest in reducing road accident costs, is represented on the board and has also supported the organisation's work.

The schemes have been self-organised throughout but have had access to up to 50% state funding in the first five years of each. After this five-year period a scheme has to be completely self-funding. The organisation says it does not want to have to compete with other public transport services for scarce taxpayer dollars. Clearly, a key source of financial support is the co-funding from businesses such as supermarkets and health care providers which wish to attract custom from older people.^[94]

Is this Big Society?

Yes. It is self-organised. It relies predominantly on volunteers, though it employs some paid staff for customer support, training, technology, fundraising, research, finance and marketing. It is largely self-funding: fees cover about 30% of the cost of a ride, with the remaining 70% coming from fundraising, including business and state support. Based on the organisation's own account, its endorsement from public figures and institutions and growth rate, the outcomes appear positive. ITNAmerica has delivered 330,000 rides since foundation and through its affiliates is now delivering 4,000 a month.^[95]

Is this relevant to the UK?

Yes. Though older drivers are as safe on the roads as any other age group (and much safer than some – particularly younger male drivers), there comes a point for many older drivers when health or other concerns require them to give up driving themselves. This can have a profound impact on independence, particularly for those who live in rural areas where public transport links can be infrequent. Lack of mobility can also, of course, impede many forms of civic engagement, including volunteering. In the Independent Age report cited in Chapter One, one in five Independent Age members said lack of transport was a factor preventing them from seeing friends and family.^[96] As councils consider their expenditure on rural bus services, a scheme of this nature is surely worth considering.

3. Southwark Circle of Care (UK)

Origins and context

Southwark Circle was developed out of research supported by the Department of Work and Pensions, BSKyB, the public service design consultancy Participle and the London Borough of Southwark into what older people, many of whom did not live close to their families, thought would most improve their quality of life. It was shaped by Southwark Council's hope to keep older people living in their own homes for longer, rather than needing to go into care.^[97]

94. Freund K (2003), Independent Transportation Network: The Next Best Thing to Driving. *Generations* 27 (2) pp.70-77.

95. <http://newsletter.itnamerica.org/ITNAmerica/Winter11/WebRoadAhead.html>

96. Links between social exclusion, loneliness and social exclusion in older people, above.

97. Report to Southwark Council Health and Adult Care Sub-Committee, 29 November 2010.

The scheme

Southwark Circle is a paying membership organisation for older people. It combines public, private and voluntary contributions to allow its members both to build their own social networks and to get help with practical tasks like cleaning, DIY, gardening, shopping and computer support. **Anyone over 49 in the borough can join but the Circle is deliberately not branded as being for older people.**

Project leader Daniel Dickens comments: "Many people would be shocked to hear that the Circle has support from the Council. It operates outside the world of social care even though some people use their personal budgets to pay for membership".^[98]

The organisation required a £1m initial grant in 2009 but the aim is to become self-sustaining within three years. The Department of Health's 2010 document "A vision for adult social care"^[99] has already quoted it as an example of a successful model for reducing dependency on care services. The London Borough of Hammersmith and Fulham and Suffolk County Council have entered three-year contracts. Lambeth and Lewisham are looking into following suit.

There are now around 850 members of Southwark Circle, paying £20 a year for a monthly newsletter of information about free and paid-for social events, and a free advice phone line. Some of these members volunteer informally by coming into the small Circle office, which usually has two paid staff, to help ring round other members to tell them about social events. However, there is deliberately no attempt to see the office as a conventional day centre: instead social events are held at local cafes, often with a group discount, or involve visits to attractions.

In addition there are around 100 Neighbourhood Helpers. These are CRB-checked and in some cases paid the London Living Wage for their time. They can also become members themselves and receive a discount on their membership. That means there is a small element of timebanking, but essentially this is a membership organisation.

The Neighbourhood Helpers can be called upon via the phone line or online using the Circle's own system. They are paid in tokens which cost £10 for a notional hour of help with cleaning, DIY and other services. According to Daniel Dickens, the user of the service will often willingly use a token to pay for a job which lasts less than an hour because they value the opportunity to chat with the helper. Members can request a particular helper whom they know.

It had been thought the ratio of Neighbourhood Helpers to members would be a third or a quarter instead of less than an eighth. However, it has turned out that many of the members are able to help one another informally. "People are handier than we thought. A lot happens organically," according to Dickens. At the end of 2010 a third of members, who were economically and ethnically diverse, were under 65. The average age was 70. Governance is provided by a steering group of council officers.

98. Author's interview, 29 June 2011.

99. <http://www.dh.gov.uk/en/Publicationsandstatistics/Publications/PublicationsPolicyAndGuidance>

Clearly this is not a barter system in which all members contribute services as well as receiving them. Members are paying what for them is a material sum – but in return they are able to take part in the social activities, receive group discounts at local businesses and use the free advice line. They also benefit from a sense that they are not passive recipients but to some degree empowered by being part of a group they have chosen to join, in addition to the services they receive.

In the first year evaluation, one member commented: “Southwark Circle is more you are doing things with other people because you choose to. It’s not like, ‘You poor little victim, you.’”^[100]

In addition, as far as paying for small DIY, gardening and computer tasks was concerned, the service was also valued because members who felt tradesmen typically gave pensioners a bad deal were, by contrast, able to trust the Circle helpers. They also felt able to ask for help with small tasks that most plumbers or gardeners would not take on. The Circle office also provided trusted tradesmen recommendations for tasks like satellite dish installation that could not be carried out by the Neighbourhood Helpers.

The Helpers were typically working freelance or were on benefits before joining. They generally said they would not have done the work for free but they did value the self-help character of the scheme. They also valued the social interaction with members. In some cases the activity had helped them return to full-time work.

Some evaluation tools have been developed by Participle to look at the savings involved in delivering services through a Circle as opposed to conventional methods, although naturally much depends on each local authority’s cost base. For example, Participle estimates that the Helper network had saved £85,000 over approximately a year, compared to the £125,000 annual funding of the Southwark council-delivered Handyperson service. It also estimated the social activities the Circle delivered as costing £58,500 less than they would have done through day-care centres.

In addition, 5% of members had previously received benefits after assessment as having moderate needs, but now received their support through the Circle. This would have been worth around £18,000 a year to the council in home care costs.

The consultancy is also experimenting with other ways of measuring life satisfaction as a result of the Circle’s activities.

Is this Big Society?

Possibly. The organisation is not self-organised as such, since it relies on Participle’s paid staff as well as the Circle office’s two employees, but it is user-driven. It does use volunteers, but the balance between volunteers and paid staff is hard to quantify since much of the volunteering is informal. A key question will be the success of the scheme in replacing the council funding of £1m with a self-financing structure by mid-2012.

100. Southwark Circle, One Year On, July 2010.

4. University of the Third Age

Origins and context

The organisation was originally started in France where it was attached to existing universities. In Britain, by contrast, the model is more self-organised, each group being run by a democratically elected management committee of members, and each group, usually regional, being self-financing. A central government grant of over £14,000 was required for three years from 1988.

The scheme

University of the Third Age is an adult education movement which provides opportunities for older people to engage in intellectual pursuits and lifelong learning by drawing on the skills and knowledge of members. **It is self-organised, self-funding, and an inspiration to many of those involved.** Membership rose to over 230,000 in England in 2009.^[101]

There are no academic restrictions on membership or classes, nor is there any assessment or examinations. Walking, dance classes and cultural visits are among the activities offered. Many U3A branches offer 'Members On Their Own' (MOTO) events, designed to encourage those who live alone to take part. There is a general freedom from authority and complete flexibility, encouraging groups to experiment and find the approach that best suits them. The demolishing of traditional barriers to learning in later life, as well as the fact that the classes are run at convenient times, in convenient locations and for very low cost, has led membership to grow.^{[102] [103]} Space in public libraries and support from cultural organisations is often provided for free, though there are concerns about whether this will continue as spending cuts take effect.^[104]

In most cases the Universities can be described as communities of learners without distinctions between teachers and learners.^[105] It has been shown that learning in retirement programmes such as the University of the Third Age can improve and prolong quality of life, support self-sufficiency and increase well-being.^{[106] [107]}

A virtual University of the Third Age has been launched which allows people who are isolated or restricted by health or other problems to enjoy and benefit from online learning and sharing.

A 1997 study of U3A in Australia and New Zealand put the value of the teaching, administration and other volunteer work at the organisation at A\$4.5m a year (£3m). An hourly rate of A\$10 (£6.50), about that paid by McDonald's locally at the time, was used. This was conservative in the light of the qualifications and life experience of many U3A members. An hour of preparation time was included per hour of teaching time. If the hourly rate needed for paid professionals were used, the total would be up to three times higher. There is no comparable study for the UK, but as the network here is much larger, a higher figure for the value of the U3A's UK work seems likely.

101. University of the Third Age, at <http://www.u3a.org.uk/pree-releases/708-5th-january-2011.html>

102. Swindell, R. and Thompson, J., (1995), An international perspective on the University of the Third Age, *Educational Gerontology*, 21, pp.429-447.

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106. Swindell, R., ed. *Positive Ageing*. Proceedings of the 1st NSW U3A Conference. Orange, Australia: Orange University of the Third Age, 1991.

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Is this Big Society?

Yes. U3A is self-organised, with local U3As being self-governing. Providing the aims and guiding principles are adhered to, local U3As can use the name. The Third Age Trust provides administrative support and encourages new U3As, including giving small start-up grants. Intriguingly, despite this lack of central direction, U3As have spontaneously developed activities – like the ‘Members On Their Own’ activities – that tackle serious social issues such as isolation.

The balance of volunteers to staff is overwhelming, with over 250,000 members and only 14 staff at the Bromley national office, half of them part-time. Funding comes from subscriptions, ranging from £10 to £20 annually, with outside grants, such as the government intervention referred to above, only if they are without conditions conflicting with the aims and principles. In terms of outcomes, the organisation now has a quarter of a million members and continues to grow. The Australian/NZ estimate of £3m for the value of its annual services is an indicator of the potential scale of its work: there are 140 U3A groups in those countries, compared to nearly 800 in the UK.



Chapter 6. Recommendations

Older people are already making a disproportionately large contribution to the Big Society. The challenge is to increase this contribution while ensuring that new generations show the same levels of civic engagement, particularly volunteering, as they themselves get older.

This challenge should be reflected by government and voluntary sector action. We agree with the *Giving White Paper's* view that it is not the government's duty to **enforce** the social norm of giving time and money: however, the benefits to the participant as well as society are such that there is a duty for government to **promote** these and exploit its networking and information-sharing power in that cause. Clearly ministers cannot tell people to volunteer and get involved, but they can enable civil society organisations to play their part. That process is already underway following the *Giving White Paper*, but we believe there could be more emphasis on the giving of time and promoting civic engagement, as well as the giving of money. The following recommendations should be seen as a starting point.

The fact that older people already volunteer, vote, donate and engage in the community more than other age groups is itself a route to further progress. The 'nudge' approach to behavioural economics, embraced by the Coalition Government in its creation of the Behavioural Insight Team, suggests that the example of others in one's group is powerful.^[108] Demonstrating that others with whom one identifies are already acting in a certain way prompts similar action. So it is doubly important to communicate how much older people do for the Big Society – both because it is the truth, and because it may inspire others to follow.

However, the message cannot be "do what other older people do". As Gransnet and the Southwark Circle leader emphasised, and those marketing to older people are well aware, it is important not to brand groups or activities as "for older people". Many people, in any of the over-50 groups, do not see themselves in that way. The message that "this is what people like you do" has to be carefully framed.

There are plenty of organisations in the UK which do not describe themselves as being for older people but nonetheless have membership and mailing lists which include many over-50s: for example, heritage organisations such as the National Trust, which has 55,000 volunteers of its own, and arts organisations such as orchestras and opera houses.

We see these organisations, which enjoy enormous goodwill, as being able to play a part in establishing the new social norm: that Big Society action is central to later life. The National Trust is entitled to suggest its own projects to those of its members who wish to volunteer; but if their skills and abilities happen not to fit the Trust's needs, it would be a service to those members to put them in touch with other organisations in need of volunteers. We believe that employers and private pension providers could also make information about volunteering and civic engagement opportunities available in the same way, and thereby create goodwill amongst their employees and clients.

108. Thaler and Sunstein, 2008, above.

In this report we make the following recommendations:

- The forthcoming Giving Summit, to be held in autumn 2011, should include a special section on volunteering and civic engagement by older people, providing an opportunity for charities to share best practices in recruiting, retaining and developing older volunteers.
- The government should deliver on its *Giving White Paper* promise to train ex-civil servants as voluntary volunteer managers to support charities, and must make its experience available to employers to enable them to do the same.
- Following on from the Hodgson Report, as soon as the outstanding questions about regulation and volunteers' exposure to legal liability have been clarified, there should be a joint charity 'myth-busting' publicity campaign to reassure potential volunteers and charity trustees, wherever possible, that their concerns are mitigated.
- Charities that still apply upper age restrictions to their volunteering practice should stop doing so.
- Heritage and cultural organisations whose mailing and membership lists include large numbers of older people, and which do not use these people as volunteers themselves, should be encouraged to attach to their mailings regular reminders of information gateways on volunteering, such as that of Volunteering England.
- Similarly, at little cost, pension providers in contact with the about-to-retire and the recently retired should include links to a new portal with information about volunteering opportunities and other civic engagement.
- Government departments and agencies, such as the Department of Work and Pensions and HMRC, should also include this information in their communications to those approaching retirement or already retired, although it would have to be clear that there was no element of compulsion.
- Employers should look at providing information about volunteering and civic engagement opportunities to older people being made redundant or retiring early. This could be promoted by the Department for Business Innovation & Skills' Every Business Commits Forum, which sets out areas in which Government and business can work together to help build the Big Society.
- Businesses should ensure that employer-supported volunteering is promoted to older as well as younger employees.
- The impact of the 2011 changes in National Insurance rules for grandparents providing child care (and the 2010 changes for carers) should be evaluated by government and older people's charities to see whether they could be recast to powerfully incentivise volunteering – with potentially transformative impact.

- Councils should give active consideration to supporting a UK equivalent for the USA's Independent Transportation Network, and councils and the Department of Health should consider what support they could provide for a UK equivalent of the Japanese care credit schemes. Both councils and national government should go beyond the traditional roles of funding and organisation and consider how best they can act as 'underwriters' for schemes (such as those we describe in Chapter 5) that involve long-term banking of credits.
- The voluntary sector's contracting and service agreements with local government should include performance indicators for involving volunteers which encourage volunteers to be used effectively.
- Philanthropy UK, the free service receiving £700,000 in government funding to encourage mass affluent and high-net-worth individuals seeking to give money, should also promote volunteering and other civic engagement opportunities, as should the private banks, which are being encouraged to develop high-quality philanthropy advice.



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About Independent Age

Independent Age is a unique and growing charity: a support community for thousands of older people across the UK and the Republic of Ireland. We offer a 'helping hand from a trusted friend', tackling older people's poverty and loneliness by offering information, advice and friendship. Our help varies according to the type and extent of the individual's need.

All the older people we help receive:

- *Information about benefits and other issues affecting older people*
- *Ongoing support from our helpline and newsletters*
- *Membership of the Independent Age community, with the opportunity to participate in events and build friendships with other people.*

For those in the very greatest need it can include even more: regular befriending and support from an Independent Age volunteer, detailed assessment and casework, practical support and even financial help in emergencies.

Our support lasts as long as it's needed - in many cases, for life. And we use the knowledge we gain from providing our services to help influence policy and practice.

Author's Note

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Antonia Cox



ResPublica
changing the terms of debate

The rapid ageing of our society creates many challenges – from the provision of healthcare, to work, pensions, savings, housing, and of course social care – but ageing should not be framed negatively. It provides opportunities to use the skills and experience of older people to help strengthen or even re-create civil society. Older people already make a positive and wholly disproportionate contribution to our society by volunteering, charitable giving and helping to maintain the values and principles underpinning our civic society. In the future we and they can do more to significantly boost participation and volunteering, providing the time and experience to transform our civic culture and help people of all ages. We need to rebuild the links between the different sections of our society and recover connections and restore engagement – while the young are often encouraged to aid the elderly, the old can also help the young, just as the advantaged can aid the disadvantaged and the skilled the unskilled.

In this report, we examine the trends in ageing, the many different forms of contribution by older people to society and explore how older people can be helped and encouraged to volunteer in greater numbers and take more responsible roles in our society. Big Society is not just about volunteering, it is about association in its broadest sense. It includes among other things new forms of economic and social renewal, a new community-based form of health and well-being, a different role for the state, a radical localism, and the creation of a new form of social and civic solidarity – be it simply good manners or communities coming together to challenge crime. But volunteering does have a crucial and decisive role. It creates a wealth of social capital that can help platform and propagate all the other goods that most people want and many more need.



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