

**Older Adult Volunteers: Understanding the meaning of volunteering  
in the transition to retirement**

by

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*Author's Declaration*

I hereby declare that I am the sole author of this thesis. This is a true copy of the thesis, including any required final revisions, as accepted by my examiners.

I understand that my thesis may be made electronically available to the public.



## *Abstract*

In the fall of 2015, Statistics Canada reported that for the first time in Canadian history that the number of Canadians over the age of 65 was greater than the number of Canadians under the age of 15 (Statistics Canada, 2015). The Canadian federal government projects the trend of an aging population to continue, with the proportion of Canadians over the age of 65 growing even further over the next two decades (Employment and Social Development Canada, 2015). The aging of the baby boom generation into retirement and beyond presents a number of challenges for OECD countries like Canada in funding support programs like the Canada Pension Plan (McMahon & MacQueen, 2014), and in providing adequate and appropriate social programs (McNamara & Gonzales, 2011). It also represents potential opportunities, the most significant of which is an increase in available older adults to work in volunteer roles in the movements and organizations which rely on volunteers to operate in a landscape of increasingly scarce external funding (Kelly & Harding, 2004). For those older adults who chose to volunteer in retirement, their involvement is a way to derive meaning through complex interactions of personal needs and desires which make up the individual's measures of self-worth, community concept, and the way they identify themselves as a person (Iwasaki, Messina, Shank, & Coyle, 2015). At this time, only about 35% of Canadian adults over the age of 55 choose to volunteer (Turcotte, 2015), but with the size of this population quickly increasing, even a small percentage gain in active volunteers could greatly increase the available volunteer labour in Canada over the next 10 years.

The aim of this grounded theory study is to explore the meaning of volunteering in the lives of adults over the age of 55 as they transition into retirement. Specifically, this research addressed the following research question: What role does the volunteer experience play in meaning-making during the transition to retirement among older adults?

15 in-depth, one-on-one interviews were conducted with adults who were over the age of 55, engaged in regular volunteering with a small non-profit organization in their community, and who had retired within the last 5 years, or were in transition to full retirement from career work. Constructivist grounded theory methods were used to collect and analyze the data.

Analysis of the data revealed six primary themes which contributed to the meaning of volunteering for older adults as they transitioned to retirement: (1) role identity through the transition to retirement, which included the need for autonomy and personal challenge; (2) confronting aging, health, and dying; (3) the complexities of time use in retirement; (4) facing fear/anxiety about transitioning to retirement, including the loss of purpose and the loss of personal connections; (5) the influence of finances on volunteer decisions; and (6) making a difference in people's lives, including deriving personal value from helping others and helping in the community. Each of these concepts is discussed as individual and inter-related contributors to meaning-making for older adults as they volunteer in transition to retirement. Analysis also yielded some suggestions for organizational improvements in volunteer recruitment and retention, which are applicable across a variety of non-profit organizational landscapes.

**Keywords:** *Volunteer, Retirement, Older Adults, Meaning Making, Transition*



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## *Dedication*

For my partner.

Because you thought this was right for me, and helped me move through it.

Because you support me in all kinds of ways.

Because you are there for me.

Because you still had the energy to get married, get a dog, do two major renovations, and keep me alive.

I love you.



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# 1. Introduction

## 1.1 Background

In Canada, the number of individuals reaching and entering into retirement is at an all-time high (Statistics Canada, 2015). These individuals are moving out of full-time working roles and into one of the many iterations of retirement, a time of life which is replete with fundamental changes to the way these individuals live and function within society (Denton & Spencer, 2009). As a greater number of individuals retire, or prepare to retire from work in Canada, we are faced with many associated challenges. For example, critical economic challenges exist including funding the increased pressure on the social assistance and government held pension systems with an increased draw-down load, and a smaller contributing cohort (Disney, 2000; Weaver, 2004). Skills-based challenges arise when long-time, highly skilled workers retire from the skilled trades with far fewer qualified workers following them to fill those jobs (Wright, 2013). There are health care challenges where the load on the Canadian health system and public/private insurers will increase significantly over time based on the demands of the aging population (Canadian Institute of Health Information, 2014; Komp, van Tilburg, & van Groenou, 2012). There are also social challenges, where individuals who have left paid work seek to replace those meaningful experiences somehow.

Alongside the challenges presented by an ageing population, there are potential opportunities. One of these opportunities addresses the notable challenge for community organizations with volunteer labour shortages. The idea of a volunteer shortage, especially when considering a cohort of healthy retirees, seems contrary to ‘popular belief’ related to free time in retirement and the ‘responsible’ use of this time by those retirees (Einolf, 2009). Linked to an assumption that older adults have personal and civic commitments within their communities, free

time, and were taught an ethos of personal sacrifice by war veteran parents, we sometimes assume they will use free time in volunteer activities (Einolf, 2009; Kelly & Harding, 2004; Lee & Skinner, 1999; D. Parkinson, McFarland, & McKenna, 2015). Rather, research shows that volunteering does not peak in the retirement years, but finds its highest point, on average, in mid-life within western democracies (Einolf, 2009). What this means is that although retirees may have more free/leisure time, some are not choosing to spend that time volunteering, and organizations may be missing out on a potentially valuable human resource.

In Canada, we have come to expect civic engagement through volunteering from people of all ages. As volunteering has become a mandatory part of the high school curriculum in Canada (Westheimer & Kahne, 2004), and volunteering becomes a significant factor in competitions for employment (Kamerāde & Paine, 2014), we have created a form of essentialism around volunteering for young people, citing a lack of volunteer commitment as compared to older generations. This essentialism values volunteerism as a developmental tool and a civic necessity so strongly that individuals cannot be ‘good’ citizens without it (Hemingway, 1999; Westheimer & Kahne, 2004). With mandatory volunteering in schools in place, we see a higher percentage of Canadians under 20 volunteering than any other age group, but they are not followed, as you might expect, by older Canadians with lots of ‘free time’. In fact, the number of people who volunteer as a percentage of the population decreases as Canadians age into retirement (Vézina & Crompton, 2012).

Of those retirees who choose to spend time volunteering, there are those who have made volunteering a part of their lives throughout their lifespan (J. D. Smith & Gay, 2005). These volunteers often commit long hours, and make a point of committing to volunteer time even through major life changes (J. D. Smith & Gay, 2005). In contrast, there are other volunteers

who do not begin volunteering until later in life, sometimes not beginning until retirement, as if triggered by these changes in lifestyle (J. D. Smith & Gay, 2005). In 2010, roughly 40% of all Canadians (13.3 million) engaged in some sort of volunteer activity, giving over 2 billion hours of labour (or about 1.1 million full-time jobs) during that year (Vézina & Crompton, 2012). This work was done across a variety of sectors, with sport and recreation and social services receiving the most volunteer commitment (Vézina & Crompton, 2012). Although younger Canadians are the most likely to volunteer, with roughly 55% of 15-24 year olds giving volunteer time, older Canadians are also volunteering in large numbers with about 41% of Canadians aged 55 to 64 and 36% of Canadians 65 and older giving their time (Vézina & Crompton, 2012). Also, as of fall of 2015, the number of Canadians 65 and over is now larger than Canadians 0-15 years of age (Statistics Canada, 2015). All told, the data suggests that older adult volunteers may be an incredible resource for the non-profit sector. With years of personal experience and expertise, they are well suited for leadership and administrative roles, as well as programmatic or operational roles in areas of niche expertise.

Whether they are engaged in volunteer work throughout their lives, or have begun volunteering as they retired, older adults in the process of retiring are in a major transition period of their lives. Transition points are major areas of change in the lives of individuals which can profoundly affect the way they interact and engage with the world (H. E. Quick & Moen, 1998; Van Willigen, 2000). Retirement in particular presents a variety of challenging situations for individuals in transition, as they are exiting paid employment which may have been their primary life focus for many years (Blanchard-Fields, Solinge, & Henkens, 2008; McNamara & Gonzales, 2011). Moving out of the workforce could translate into feelings of role loss, disconnection from important social networks, loss of purpose or focus, or perceived lowered social status (Lancee &

Radl, 2012; Mutchler, Burr, & Caro, 2003; D. B. Smith, 2004; Tang, 2015). The transition to retirement presents opportunities as well, including higher levels of free time to engage in voluntary activity, and the high levels of personal and professional expertise to contribute to organizations (Kleiber & Nimrod, 2009; Morrow-Howell, 2007; Morrow-Howell, Hinterlong, Rozario, & Tang, 2003; Nimrod & Adoni, 2006). Some older adults may even seek out volunteer roles to help compensate for the transitional losses discussed above (Mutchler et al., 2003; Tang, 2015). As retirement is expected of individuals in the Canadian workforce, this transition and the inherent complexities and diversity of it occurring throughout a diverse population, merits academic attention. It is through this transition which I will explore the experiences of older adult volunteers.

Regardless of the personal motivation of older adults seeking volunteer opportunities, they must find organizations which are equipped and prepared to provide them with positions. Many community-based non-profits rely exclusively, or almost exclusively, on volunteers for their operations (Hong, Morrow-Howell, Tang, & Hinterlong, 2009; Vézina & Crompton, 2012), and are an excellent place for older adults to seek the meaningful leisure activities they desire for life satisfaction (Gibson, Ashton-Shaeffer, Green, & Autry, 2003; Nimrod, 2007b). For example, some research has shown that non-profit community clubs are locations where older adults spend significant amounts of volunteer hours, and see that commitment as serious leisure (K. Chen, 2014; Misener, Doherty, & Hamm-Kerwin, 2010). Organizations which program for, and recruit, older adult volunteers are essential to the social and personal satisfaction of older adults.

Even with large bodies of literature on volunteering in non-profits, and older adults transitioning out of paid work, academic work exploring volunteering with community-based non-profits through transition to retirement is lacking. Studies exploring how this might be a

particularly meaningful time of engagement for older adults is also sparse. Further, qualitative research which engages older adults more directly in the sharing of experiences about volunteering in community non-profits through transition to retirement is all but absent from the academic literature.

What follows is a qualitative study which seeks to illuminate the experiences of older adults who volunteer as they move through the transition to retirement. These older adults form a significant demographic in Canadian society, and are both participants and drivers of community organizations. Better understanding their choices to volunteer, and what that volunteering means to them, should allow for a broader understanding of the retirement experiences, as well as how retirees might be best served by and work for community organizations.

## **1.2 Purpose Statement**

The purpose of this study was to understand the meaning of volunteering for older adults during the transition from paid work to retirement, and how this affects the nature of their volunteer involvement.

## **1.3 Research Question**

The research addresses the following question:

What role does the volunteer experience play in meaning-making during the transition to retirement among older adults?

## **1.4 Significance of research**

Volunteer labour is a significant contributor to the economic and social engines of Canada and other westernized democracies (Statistics Canada, 2001; Turcotte, 2015; Vézina & Crompton, 2012). As a mandatory piece of civic and social education in Canada, the emphasis placed on this type of labour for the development and maintenance of the Canadian social order

is large, and the total number of volunteer hours given in Canada each year is close to 2 billion (Vézina & Crompton, 2012); making it a significant contributor to the social and financial economies of Canada.

Volunteering allows for social and service programs to operate when funding is difficult to acquire and maintain (C. Chen & Lee, 2015; Turcotte, 2015). Volunteers are an integral part of communities' ability to provide programming in areas like children's sport (e.g., many minor sports associations like hockey and soccer leagues are run exclusively by volunteers) (Trussell, 2015), community health care (candy strippers in hospitals and community volunteers in hospice care) (Komp et al., 2012), and religious institutions (most traditional churches have very few paid staff and older adults have been shown to volunteer most at religious institutions) (Krause, 2015).

The maintenance of volunteer programs relies on good governance and organizational practice, but relies even more heavily on the desire of individuals to participate in available volunteer roles (Amis & Slack, 1996). Understanding why individuals choose to volunteer, and how groups of individuals differ from one another in those decisions is of vital importance to maintaining volunteer numbers. There are many reasons why someone might choose to volunteer and exploring these motivational pathways on an individual level can provide great insight into motivational trends within larger populations.

Transitions during the life course have a major impact on the activity and time-use choices of individuals (Grenier, 2012). Transitions most often associated with older adults include changes in health, being widowed, and retirement (Grenier, 2012). The idea of retirement, although not new, has become ubiquitous in Canadian society, creating a transition space which is widespread, but under studied. This is particularly true given the recent revelation

that the population of Canada now includes more individuals over the age of 65 than under 15 (Statistics Canada, 2015). Although studies explore how retirees volunteer, in what numbers, and some social trends that may encourage them to do so, much less work has been done collecting volunteer stories, or exploring diverse volunteer experiences through the transition to retirement. This study will focus on Canadians who are recently retired (within the last five years) or are currently transitioning to retirement.

Larger institutional difficulties aside, understanding the motivations of all types of older volunteers is essential to the task of recruitment and retention. It is well established that those with a deep history of volunteering are likely to continue doing so as older adults (J. D. Smith & Gay, 2005), so gains over and above these numbers will need to come from older adults new to volunteering.

In order for organizations to access new potential volunteers, we must first and foremost understand why older adults choose to volunteer through the transition to retirement, and why this manifests as a meaningful activity for them during this transition. Through the act of volunteering individuals seek connections, health benefits, social engagement, and general well-being improvements (see: Komp et al., 2012; Lancee & Radl, 2012; J. C. Quick & Moen, 1996; Wicker & Hallmann, 2013), and some work in this area is specific to older adult volunteers (see: Harris & Thoresen, 2005; Jirovec & Hyduk, 1999), but research which specifically addresses the personal experiences of older adult volunteers as they seek meaningful activity through volunteering in the transition to retirement is lacking. Research like this explores the motivational pathways for choosing volunteer roles, and along with better understanding the volunteers themselves, allows for the development of better recruiting and retention tools for organizations.

What is truly lacking is work specifically on the transition to retirement as this reflects volunteer commitments and involvement through the direct experiences of those older adults. High quality, qualitative study of this important life transition is not present in the literature, and this leaves a significant gap in our understanding about retirement and the effects of transition out of paid work on the individual. This work goes beyond demography and population statistics so that it can reflect back to community not for profit organizations the experiences of their volunteers, and create better environments for those volunteers.



## **2. Review of Literature**

### **2.1 Retirement**

The following section will explore the literature on the phenomenon of retirement. Along with an explanation of the current definition of retirement, it will include sub-sections on the ages of retirement, the stages of retirement as they are described in the academic literature, and normative social expectations surrounding retirement in Canada.

#### **2.1.1 What is retirement?**

Sold as “the golden years” of life in western society, retirement and the associated changes in lifestyle have come to form an essential part of our understanding of work life and use of time as we age (Denton & Spencer, 2009). Denton and Spencer (2009) gave a systematic review of retirement in the literature which included work from Canada, the US, UK, Organisation for Economic Co-operation and Development (OECD) publications, and Israel, and admitted that the “notion of retirement is inevitably fuzzy” (p. 2). With this in mind, they go on to give a generalized definition which, holds true across most of the works in their study. For Denton and Spencer, retirement is defined as the withdrawal from paid working life, and is normally understood as having done so in later years with sufficient resources to support one’s self (with or without state subsidy) until death. In their definition, the withdrawal is far from smooth, necessarily complex, and can have multiple transitions in and out of paid work (Denton & Spencer, 2009). As a stage in life, retirement is expected and even mandated in some cases (Shannon & Grierson, 2004). Developed as a means of ensuring that younger workers would have opportunities to move into permanent positions as they developed skills, retirement, both voluntary and mandatory, became part of the social order (Makarenko, 2010). For the purposes of this examination, retirement should not be confused with some of the other reasons why an

individual may stop working, including: medical issues or disability, family caregiving responsibilities, or inability to work for other reasons, even if these might be called retirement in some cases (Denton & Spencer, 2009). It is also important to note that retirement is not always tied to age (McMahon & MacQueen, 2014). Although retirement is normally linked to categorical age spaces (individuals are generally expected but not mandated to retire at 65 in Canada – discussed further below), there are many individuals who are able to retire before age 65 due to the availability of full pensions, extensive savings and investments, and/or other financial holdings which allow for the cessation of work at an earlier age (Denton & Spencer, 2009; Government of Canada, 2015).

### **2.1.2 The ages of retirement: Early, Normal, Late, and Mandatory**

The terms early, normal, and late retirement can be misleading because, by definition, retirement may occur at any age (Denton & Spencer, 2009; McMahon & MacQueen, 2014; Shannon & Grierson, 2004). The determination of what is considered ‘early’ or ‘late’ retirement rests on the ‘standard’ retirement age within a particular country. Each country sets this age for Federal employment law purposes, and although these are normally not mandatory retirement rules, they are most often enshrined in the tax code and old age social support structures creating a point at which an individual can expect state support in the cessation of employment (Government of Canada, 2015).

#### ***2.1.2.1 Early retirement***

The early retirement age, as set by individual countries, is the age at which an individual can retire from employment and still receive some social assistance from their government old age/retirement pension plan, or social security meant for older individuals (OECD, 2014). These benefits are reduced for those seeking early retirement, and the age at which an individual can

receive any benefit is set in relation to the regular retirement age. In Canada, individuals may elect to begin receiving retirement benefits paid by the government as early as age 60 (Government of Canada, 2015). In this case, the individual would receive a pension amount which would be permanently reduced as compared the standard calculated amount, based on contributions and salary over time and calculations based on taxed earnings (Government of Canada, 2015). The amount of that reduction is a percentage of the overall benefit per month calculated as it reflects the age of the individual at the time of application (Government of Canada, 2015). This methodology, also adopted by other nations including the United States and Germany, is a way of supporting the retirement decisions of citizens, without taxing the pension system beyond the available assets of the program (D. Parkinson et al., 2015). Program sustainability is under fire in many countries as the large cohort of aging adults known as the “baby boom” enters their retirement years (Government of Canada, 2015; McMahon & MacQueen, 2014; OECD, 2014). There are significant fears in many countries including Canada, that contributions to pension plans and other social security support structures will be insufficient to support the large numbers of beneficiaries, even if they take on earlier pensions at lower rates (McMahon & MacQueen, 2014; D. Parkinson et al., 2015). Some countries facing economic hardship (e.g., Greece), have reduced pension amounts to compensate for lack of funding for pension plans, effectively forcing a reduction in funds on its oldest citizens, and retirees in the future (OECD, 2014).

### ***2.1.2.2 Normal retirement***

Normal retirement age is the age at which the government of a state has established as the appropriate time for a citizen to receive the full calculated benefit of the sponsored retirement income they provide (Government of Canada, 2015; OECD, 2014). This age is established using

the life expectancy, typical pay-in over time of individuals, average draw-down by an individual on the system between issuance of the benefit and cessation, and in more recent iterations of pension systems, the ability of the system to fund the projected benefits into the future (Government of Canada, 2015; Makarenko, 2010; OECD, 2014). Although this age has been static in many countries for a long time, many western nations have initiated schemes to raise the regular retirement age to receive full benefits; in the 2012 OECD outlook on pensions throughout the organization, 28 of the 34 member nations were in the process of increasing their normal retirement age (OECD, 2012). These moves are reflexive of longer lived citizens who will draw down more assets from the fund over time, as well as the smaller cohort of contributors who will be called upon to support that aging population (Kelly & Harding, 2004; Lee & Skinner, 1999; McMahon & MacQueen, 2014). In Canada, the incremental eligibility criteria was set to slowly move the age of normal retirement from 65 years to 67 years with a phased in approach (Government of Canada, 2015), but this change was halted with a change in federal government in early 2016.

### ***2.1.2.3 Late retirement***

Even though individuals in Canada are eligible for full pension at the age of 65, and the strong social and perceptual allure of retirement notwithstanding, there are those who continue to work past the age of normal eligibility. There is some benefit to this to the individual as they become eligible for a higher pension amount, provided they continue to pay into the pension plan (Government of Canada, 2015). Much in the same way that early retirees take a penalty to their pension amount, those who choose to retire after age 65 are able to hold off applying for pension benefits with a net monthly percentage increase in their pension when they do apply (Government of Canada, 2015). In essence, the longer an individual contributes to the pension

plan after the age of full eligibility, the more they are eligible to draw down monthly once they do apply. Although this is limited in scope (age 70 in Canada), it is a scheme taken advantage of by some Canadians who desire to remain in the paid workforce for a longer period of time (Government of Canada, 2015).

#### ***2.1.2.4 Mandatory retirement***

Although still present in some jurisdictions, mandatory retirement was struck down as contrary to the *Ontario Human Rights Code* in December of 2006 (Ontario Human Rights Commission, n.d.). Prior to this date, it was permissible to force employees to retire at a given age, at the discretion of the employer, so long as this age did not preclude the employee from accessing government benefits after retirement (Ontario Human Rights Commission, n.d.). This was found to be discriminatory under *the code*, and all workers over the age of 18 are now protected against discrimination based on age. However, this does not preclude organizations from having age-based retirement programs. Rather, it only prevents them from being mandatory, and employers may defend mandatory retirement schemes provided they can show they do not violate the code. The ruling on the *Ontario Human Rights Code* does not prevent employers from creating differential provisions for health insurance and workplace health and safety for those over 65 years of age, and these provisions are not able to be challenged under *the code*. Mandatory retirement may no longer be a current issue in Ontario, but it does provide some context for the valuation (or lack thereof) of older workers within the workforce, and the personal and social pressures associated with continued work in this age bracket. The history of mandatory retirement may also set a normative expectation among individuals related to expectations and perceived appropriateness of retirement age.

### **2.1.3 Stages of retirement**

To complicate the concept of retirement further, it is often not a single process of moving from a full working life to full retirement (Denton & Spencer, 2009). In fact, there are a variety of stages of retirement transition which have been discussed in the literature, each having implications for the retiring person, but also on the possibility of engagement with volunteer and community work. Susan Chambré (1984; 1987; 1993) describes a variety of meanings for retirement as it reflects work for older adults. She describes how retirement could mean returning to work as before, but in a different capacity within the same organization. Another option could be continuing at the regular place of employment in a part-time capacity. Sometimes called bridge work, this type of change in work roles is meant primarily as a transition space where the outgoing individual may train their replacement, or ensure that processes are in place to make a smooth transition to new employees/managers (Griffin & Hesketh, 2008; Kim & Feldman, 2000; Ruhm, 1990). This often takes place if a company is sold and/or previous ownership retires to ensure continuity in business practices and maintenance of positive customer relations.

Chambré also discusses entering an entirely new career at retirement. This could be a leisure or hobby-space career which the individual was unable to pursue while in the full workforce, and therefore done for personal interest as well as financial gain. Or, it may be that the individual requires the income generated from this new work in order to maintain an adequate lifestyle in retirement, supplementing government/workplace pensions. Individuals may pass through any or all of these stages on their way to full retirement, and there are not necessarily established patterns for these processes (Denton & Spencer, 2009). Some individuals may skip them altogether and move into full retirement directly from the full-time workforce.

#### **2.1.4 Normative expectations of retirement: What do they do now?**

Beyond the financial implications of retirement, there is meaning in the cessation of work responsibilities which reflects time and use of time for retirees. Without the pervasive commitments of standard work (read: ~40 hours/week), the perception exists that retired individuals possess a significant amount of free time, or leisure time, for other activities and/or uses of time (Einolf, 2009; Nimrod, 2007a; Rosenkoetter, Gams, & Engdahl, 2001). So entrenched is this ideology that it dominates advertising and business strategy for companies associated with retirement. For example, investment companies like *Freedom 55 Financial* sell the idea of more money and more time to do what you love when you leave the hustle of the working world (Freedom55, 2015).

Some scholars have explored the use of time after retirement, and in particular the roles that leisure activities play in the use of that time. Nimrod and colleagues (Janke, Nimrod, & Kleiber, 2008; Nimrod & Adoni, 2006; Nimrod, 2007a; Nimrod, 2007b; Nimrod, Janke, & Kleiber, 2008), have looked extensively at the use of leisure time in retirees, and the links to perceived well-being. Their work has identified four types of leisure behaviour in this population: expanders, individuals who take on more activities with a greater frequency; reducers, who take on fewer activities and do them less often; concentrators, who do fewer activities but do them more often; and diffusers, who take on more activities but do each of them less frequently (Nimrod, 2007a; Nimrod et al., 2008). The categories identified here speak to the relative diversity of experience in retirement, and begins to divide older adults into distinct groups.

For some, the idea of extensive leisure time and personal freedom is true, and retirement is an opportunity to engage in activities or travels which were unavailable as a working person

(McDonald, 1995). For many others, however, retirement is spent negotiating the various role responsibilities which remain in the absence of work life (e.g., household work, existing social obligations, existing community involvement), financial responsibilities on lower income, and added social pressures (e.g. the pressure of civic participation at a greater level, enhanced caregiver or respite responsibilities, the perception of increased availability for informal volunteer work like helping neighbours and friends) (McDonald, 1995; Morrow-Howell, 2007).

In the absence of caregiving responsibilities, social pressures in retirement are often expressed as civic commitment, and community involvement expectations. These norms can cause pressure in both positive and negative ways – both encouraging others to participate and contribute to society in new ways, but may also constrain those who wish to spend more time alone, with family, or who have health concerns that limit their ability to participate more widely. These constraints speak to, and are perhaps the explanatory forces behind, the categorical splits in older adult leisure pursuits presented by Nimrod and her colleagues (2007, 2008); expanders, reducers, concentrators, and diffusers.

The literature on older adult leisure suggests that volunteering can be a tangible use of time and intellectual capital by individuals in order to contribute to larger society (Hong et al., 2009; McBride, 2006; Misener & Doherty, 2009), and there are many avenues for its application and examination in the literature.

## **2.2 Transition to Retirement**

Much scholarly work has been completed on the financial implications of retirement (Gruber, 1997; Ho, Milevsky, & Robinson, 1994; Keenay & Whitehouse, 2003; Lusardi & Mitchell, 2009), and health effects of retirement (Marshall, Clarke, & Ballantyne, 2001; Schirle, 2010). In addition to these significant aspects, volunteering in retirement, specifically



volunteering around the time of transition to retirement, occupies a space in the extant literature. Within this literature, significant themes emerge. First, authors in this field make a point of explaining the demographic information about the population, and the current statistical trends surrounding volunteering by older adults (Chambré, 1984; Chambré, 1993; Einolf, 2009; Kaskie, Imhof, Cavanaugh, & Culp, 2008; Mutchler et al., 2003; D. B. Smith, 2004; J. D. Smith & Gay, 2005; Tang, 2015). Although her work is not specific to the transition of individuals from work to volunteering, Susan Chambré's (1984; 1987; 1993) research is often cited as indicator studies which show that older adults, even if they have more 'free' time to spend on non-work activities, do not necessarily volunteer more often than their working counterparts. They do, however volunteer more hours when they are volunteering, an element which may speak to the larger availability of leisure time in retirement (Einolf, 2009). These basic statistics about retirees are corroborated by many authors (see: Herzog, Kahn, Morgan, Jackson, & Antonucci, 1989; Mutchler et al., 2003; D. B. Smith, 2004; J. D. Smith & Gay, 2005).

Several hypotheses have been put forward in the literature to explain this trend of lower participation rates by those over 65, including increased health issues which limit participation (J. D. Smith & Gay, 2005), increased care responsibilities for partners and/or friends (Mutchler et al., 2003) (although interestingly a body of literature exists which asserts that volunteer participation is increased in married individuals overall, which would be contradictory to the assertion that partner caregiving limits volunteer activity) (Lancee & Radl, 2012). Especially in early retirement, the need to have paid employment to maintain lifestyle benchmarks is cited as a limiting factor for volunteer participation as well (Griffin & Hesketh, 2008). Although this is perhaps intuitive as a reason to stay in the workforce instead of entering full retirement, it does contradict the idea of 'golden years' which surrounds retirement in western culture. Additional

complexity is created here by the fact that several studies show that those older adults who work, but less than full time, actually volunteer more than their peers who continue to work full time, or those who are completely retired (Einolf, 2009; Kaskie et al., 2008; Morrow-Howell, 2007; Tang, 2015). Most explanations for this counterintuitive idea revolve around the maintenance of social groups and organizational social ties which are inherent in workplace activity (Einolf, 2009; Mutchler et al., 2003; J. D. Smith & Gay, 2005).

Some authors have postulated and explored leisure participation as a coping mechanism in transition to retirement. Nimrod and Janke (2012), showed that leisure was a central factor in explaining coping with transitions in later life. Nimrod (2008), exploring specific aspects of innovation theory in older adult lives (for expanded reading on innovation theory see: Nimrod & Kleiber, 2007), showed that adding new activities after retirement is uncommon, but adding new activities had a positive effect on well-being, and that these additions mostly revolve around hobbies and exercise. Nimrod and Shrira (2016) showed both an increase in quality of life in highly involved individuals, and a reduction in quality of life in individuals with very low activity.

Another significant line of theoretical analysis in volunteering literature is that of social capital resources and the role they play in both the personal and community spaces which volunteers occupy. This social resource volunteer theory focuses specifically on the social ties between individuals and the organizational social spaces that are created around volunteering and community groups (Harvey, Lévesque, & Donnelly, 2007; McNamara & Gonzales, 2011). Wider in examination and projected explanations, these elements of volunteer theory serve to look at the broader picture of the volunteering space and bring to bear the necessary theoretical discussion points around social connectedness and the role of community involvement in the

lives of volunteers and beneficiaries (Hyman, 2002; McNamara & Gonzales, 2011). The maintenance of social ties, both in the workplace and personal social ties, seem significant in the volunteer time spent by older adults.

### **2.2.1 Theories**

A collection of existing sociological and psychological theories have been applied to help better understand the trends which have been identified in the volunteer literature. In particular, three theories have seen use in the literature related to volunteer motivation and activity choices through the transition to retirement: Role Theory, Continuity Theory, and Activity Theory. We will examine each of these theories, providing a general overview of the development of the theory, as well as its specific application to the transition of older adults from paid occupational roles, to retirement spaces. The thesis presented here will draw on these theories as a broad basis for understanding the meaning of volunteering during the transition to retirement.

Before exploring these specific theories, it is important to situate their use in this research. First, as we explored earlier, retirement is a transition point for older adults who are experiencing it – moving from one phase of life to another. This understanding is best framed using ideas of the life course which Giele and Elder (1998) refer to as “a sequence of socially defined events and roles that the individual enacts over time [and] constitutes the sum total of the person’s actual experience” (p. 22). Within this understanding, retirement serves as a node, or transition space, which changes the events and social roles the individual encounters. This transitional space is the focus of this study, as it informs important decision-making processes and changes in activity and meaning.

### ***2.2.1.1 Role Theory***

One of the explanatory theories which has been put forward to help with the specifics of elements within the life course is Role Theory (Biddle & Thomas, 1966; Sarbin & Allen, 1954); the understanding that individuals desire a certain level of role responsibility in their lives, and as they lose roles and responsibilities which they carried pre-retirement, they seek to fill these gaps with post-retirement activities. In role theory, retirement would be seen as a role exit, or the loss of a role identity, whether from paid work or other roles like mothering, or care-giving (Moen, Dempster-McClain, & Williams Jr, 1992; Wheaton, 1990). For some retirees, this is a completely different line of work, or hobby which occupies the work role (e.g., lawn/garden care, or small woodworking business). Others may seek out roles and responsibilities within agencies which offer volunteer opportunities in order to more closely mirror the role loss they are experiencing.

For some individuals, the pursuit of new role responsibilities to fill these gaps may be overt, and they may be acting directly to fill these perceived voids. For others, the actions they take in this regard may be more subconscious, as their feelings surrounding role loss may be more akin to anxiety or depression (Thoits, 1992; 1995). This is especially true if the individual felt highly successful and content in their working roles, and therefore the transition away from those roles is likely to manifest as a personal loss for them (H. E. Quick & Moen, 1998).

Role theory is also useful in the alternate scenario, where an individual was not content in their work roles, or had negative work role experiences. In these cases, the loss of work roles and transition to retirement is likely to yield very positive emotional results, as the previous roles did not contribute positively to personal well-being in the first place (H. E. Quick & Moen, 1998; Thoits, 1992).

### ***2.2.1.2 Continuity and Activity Theories***

Along with Role Theory, there is discussion of the applications of Activity Theory and Continuity Theory within the Life Course and transition to retirement literatures. These are similar, but separate theories which address the types and levels of activity individuals experience throughout their lives, and how these factors affect activity decisions in transition to and within retirement.

Activity theory is akin to role theory in that it states that individuals develop a level of activity which is comfortable for them over time, a level of occupied time at which they thrive (Chambré, 1984; McNamara & Gonzales, 2011; Windsor, Anstey, & Rodgers, 2008). The application of activity theory to the retirement transition is therefore similar to the application of role theory in that individuals will seek out a level of activity to match their comfort level when they lose the workplace activity to which they have become accustomed (Chambré, 1984). Like role theory, the inverse is also true with activity theory in that if individuals found that they were too busy during the time they worked, they are likely not to pick up volunteering or other activities to replace that activity level.

Continuity theory speaks to the maintenance of activity participation over time for individuals (Chambré, 1984). Different than activity theory, continuity theory states that we seek continuance in our actions and interests over time, and that we are likely to continue involvement in the same types of activities across time and life changes (Atchley, 1989; Chambré, 1984). Like sports participation, community involvement and volunteering often fall into this category, and individuals are likely to continue with these types of activities even when they physically move locations or change employment status like the move to retirement (Cuskelly, 2004; D. B. Smith, 2004). Continuity theory is especially applicable to volunteering and transition as individuals

who have volunteered throughout the life course are the most likely to continue volunteering through the major transition of retirement, a phenomenon which is explained in part by the continuity of actions over time (D. B. Smith, 2004). Lifelong volunteers are the strongest application of the theory with sustained volunteer roles throughout the major life course transitions. Serial volunteers, although they may have lapses during some periods in their lives, have history volunteering and maintain this likelihood to return to volunteer work in retirement in the same way. New (trigger) volunteers are the least likely of the categories to engage in volunteer work, and they do not have a personal history of volunteer action. This new action is not historically congruent for them, and it is clear that establishing a new social psychological pattern for the individual is far more difficult to maintain than engaging in a lifelong activity.

### **2.2.2 Volitional vs. Non-Volitional Retirement**

While examining the transition to retirement for older adults it is necessary to explore, at least in part, the mechanism for this transition. At its most basic, the mechanism for retirement can be divided into two categories: volitional retirement, where the retiree plans their retirement and makes a purposeful decision to stop working; and non-volitional retirement, where the retiree is forced to leave work without this being part of their life plan for that time.

Most work done on volitional and non-volitional retirement explores the effects of these transitions on the retiree themselves, their well-being and satisfaction. Isaksson and Johansson (2000) explored the effect of volition and non-volition in retirement and found that volitional retirees reported higher life satisfaction, psychological well-being, and self-reported health than did those who were non-volitional retirees. Dingemans and Henkens (2014) also found that non-volitional retirement was detrimental to life satisfaction in retirees, but that this negative effect on satisfaction could be mitigated by the involvement in bridge work during transition. van

Solinge and Henkens (2007) had similar findings, but added that the life satisfaction and well-being of retirees was also influenced by their social environment, and that the social transitions in family and work relationships were vital to maintaining life satisfaction, even with non-volitional retirees. Further, the effect of volition in the retirement transition on health has been approached in several different ways including its effect on drinking behaviour where non-volitional retirees show an increase in problem drinking behaviours (Bacharach, Bamberger, Biron, & Horowitz-Rozen, 2008), risk of heart disease and stroke where non-volitional retirees had a near two-fold increase in health risks (Gallo et al., 2006), and depression of both retirees and retiree's spouses when moving into retirement – although this study showed an increase with all types of retirement, volitional and non-volitional (H. Park & Kang, 2016).

The literature shows that there is an established link between volition in retirement and personal experience of retirement for older adults. However, much of this literature is focused on the personal effects of the volitional or non-volitional transition, and less on what outcomes this might produce for retirees.

### **2.3 Older Adult Volunteering**

The extant literature on volunteering is extensive and far too broad for a thorough examination in this document. Literature on volunteering falls into several significant categories, including but not limited to: examining the volunteer as an individual; volunteer organizations; volunteering trends - local, national, and international; private sector involvement in volunteering; social and people resources associated with volunteering, volunteering as civic responsibility. Each of these categories can be further sub-divided, for example literature on the volunteer as an individual contains work on the demographic make-up of volunteers, motivation

of volunteers, commitment levels and loyalty of volunteers, as well as rational actions and simple cost-benefit analysis for the giver of volunteer labour.

Given this extensive landscape, I will limit review of the volunteer literature to that which is specifically related to the focus of this study, older adults; more narrowly, adults at or near retirement age in Canada. A simple review of the demographics in Canada will shed light on why limiting study to this age group is valuable. In their most recent public update of demographic data for Canada, Statistics Canada has reported that for the first time in the history of this country the number of Canadians over the age of 65 exceeds the number of Canadians under the age of 15 (Statistics Canada, 2015, September 28). The Canadian federal government also projects this trend to continue with the proportion of Canadians over the age of 65 growing even further over the next two decades (Employment and Social Development Canada, 2015).

When a population is growing and there are more young people than older people, the population chart looks like a pyramid, with a wide band at the bottom, shrinking as it climbs upwards in age (e.g. Canada 1922 – Figure 2-1). Currently, the population age chart of Canada looks nothing like a pyramid, but instead is nearly inverted with a large population bubble between 45 and 70 years of age (Canada 2011 – Figure 2-2).

In the past, organizations could look primarily to younger adults and those in middle age as their main source of volunteer labour (Ellis & Noyes, 1990). But, as the current population trend in Canada continues, more older adults and less middle age/younger adults will be available to volunteer (Vézina & Crompton, 2012).



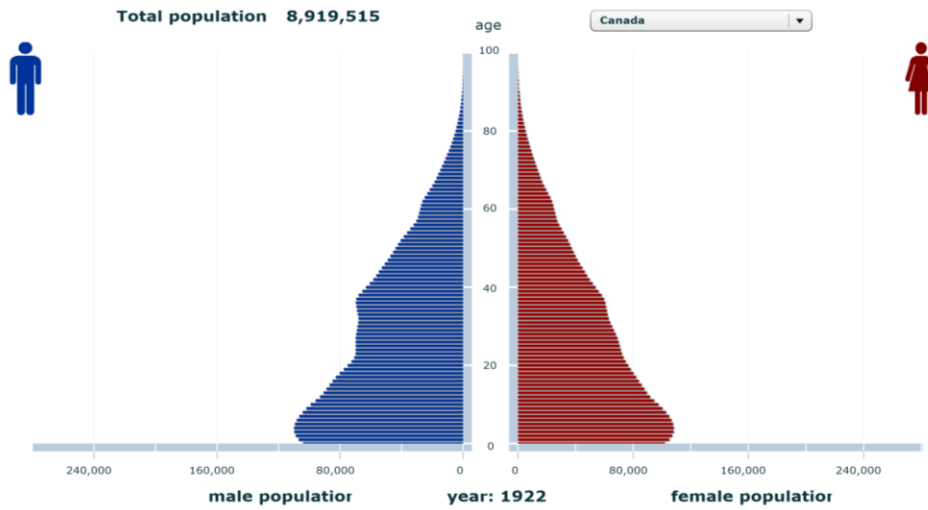


Figure 2-1: Population age chart for Canada – 1922  
 Source: Statistics Canada – censuses of population and Population Estimates Program 1921-2011

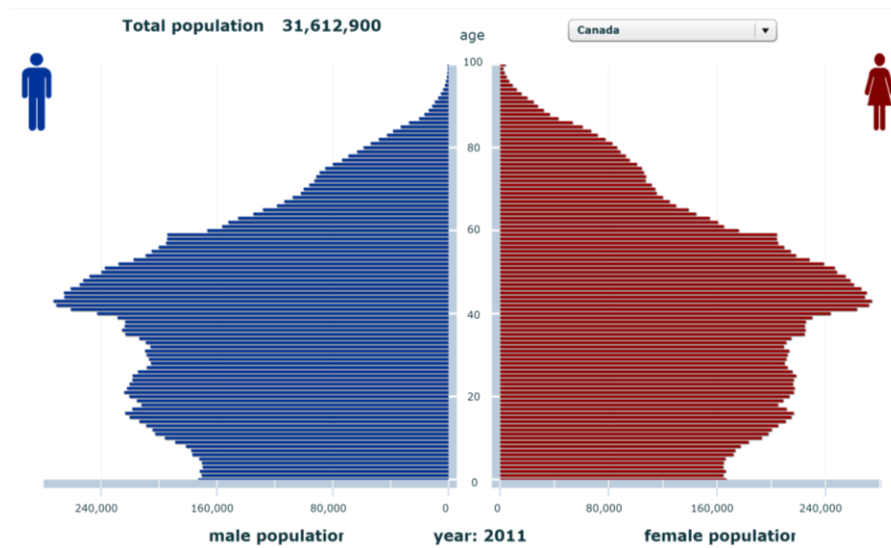


Figure 2-2: Population age chart for Canada – 2011  
 Source: Statistics Canada – censuses of population and Population Estimates Program 1921-2011

The implications for this change in population demographics are significant for Canadian governmental policy, Canadian business, and Canadian organizations, as adults over the age of 65 occupy changing spaces as citizens, employees, and volunteers (Tang, 2015). These issues are not unique to Canada. Other industrialized nations are facing similar demographic changes in their population (e.g. countries like the United States and Germany), or are already at a tipping point in population demography causing significant governmental policy changes to address difficulties (e.g. Japan) (Ezrati, 1997; Morgan, 2000). In Canada, we have not yet reached the crisis stage, but without a much better understanding of the needs and desires of a retiring population an opportunity to leverage a large cohort in work to retirement transition for social gain could be lost.

Alongside retirement, volunteering has been defined in many subtly different ways within the literature which studies it. I will cover some of those definitions here, and present a combined understanding of the term for use in the rest of this document. Statistics Canada, in their review on volunteering defines the term volunteer as “Persons aged 15 and over who did any activities without pay on behalf of a group or organization, at least once in the 12 months preceding the survey. This includes any unpaid help provided to schools, religious organizations, sports or community associations” (Vézina & Crompton, 2012, p.38). Although very specific in order to meet the needs of the survey sample, this definition touches on major components of all definitions of volunteering and the volunteer in the literature: activities are done without pay; they generally occur in a community setting. Vezina and Crompton’s definition serves one half of the volunteer spectrum, what we will call formal volunteering, or volunteer roles which meet their criteria of being “on behalf of a group or organization. This definition of formal volunteering is supported by authors like Greenfield & Marks (2004), Kaskie, Imhof, Cavanaugh

& Culp (2008), and Lancee & Radl (2012), among others. This thesis will focus on formal volunteering. The focus will be on those who give of their time regularly without expectation of financial return to community groups and organizations, and do so for personal motivations beyond financial gain.

Formal volunteering is contrasted with a less structured, sometimes less recognized type of volunteering, informal volunteering (Lancee & Radl, 2012; Messner & Bozada-Deas, 2009; Trussell, 2015). This type of volunteering often takes place within close communities, and would include actions like checking on neighbors who might be in need of assistance, shoveling snow for someone who is unable, or giving assistance to someone in need during daily tasks (Lancee & Radl, 2012). Although not institutionalized like formal volunteering, and not as easy to measure in terms of hours used and economic impact, informal volunteering plays a significant role in community and individual lives (Lancee & Radl, 2012).

Both formal and informal volunteering have participant typologies which are important to understand moving forward. These typologies describe how the individual has engaged with volunteering over their life course, and at the base level indicate differences in the way that the individual might be engaged by volunteer organizations. Easiest to describe in these typologies is the individual who has been volunteering consistently throughout the life course. Normally described as “lifelong” volunteers (J. D. Smith & Gay, 2005), they show a pattern of consistency in volunteering throughout major life events and transitions. At the other end of the volunteer spectrum are those who do not have any life course commitment to volunteering. These individuals, when they do begin to volunteer, do so because of some event or transition that leads them to seek out volunteer opportunities. Smith and Gay (2005) call these type of volunteers “trigger” volunteers, with the word trigger meant to indicate that they were encouraged, or

spurred, to volunteer by a major life event (e.g. transition to retirement). Although lifelong volunteers and new (trigger) volunteers may be similar in demographic details, their engagement with volunteering is likely quite different, and needs to be understood in order to better understand older adult volunteers. In between these two extremes there is a third type of volunteer. This type of volunteer may have prior engagement with volunteering in the life course, but have one or more long gaps in their volunteer commitments. For example, an individual who volunteered in youth sports when they had children participating, then stopped volunteering only to pick up another volunteer role at the time of retirement. This type of volunteering has been called “serial” volunteering (J. D. Smith & Gay, 2005), although this terminology is potentially problematic as it indicates both regular intervals between roles, and continuity of volunteer roles.

### **2.3.1 Older adults**

Even when limiting the body of reviewed literature on volunteers to older adults, the available literature is significant. When examining the larger themes within that literature, two categories emerge; individual considerations, and organizational considerations. These categories are subdivided in the literature and what follows are descriptions of the literature which fit into these respective categories. (Figure 2-3).

#### ***2.3.1.1 Individual considerations***

The individual considerations, or the aspects of volunteering which have direct effects on the older adults who take on these roles, are quite wide in breadth. Studies exploring these elements of older adult volunteering focus on the individual and how their involvement in volunteering changes them, their environment, and their connections to the community. Included in this section are: the motivations of older adult volunteers, including personal roles, resources,

religious influence, and access to opportunity; older adult volunteer behaviour, including how they engage with volunteering and proposed behavioural models; transition to retirement and its influence on volunteering; and effects on the health and well-being of older adults who volunteer.

The work on motivations for volunteering in older adults is extensive on its own, and delves into several sub-topic areas. Erlinghagen (2010), working with data from Germany showed that education is a major factor in volunteer motivation, but even this is out-stretched by previous life course experience volunteering. Tang and Morrow-Howell (2008) have researched how the access to volunteer opportunities affects the motivation to volunteer in older adults. Krause (2015) has done work on how involvement in religious organizations is a major factor in the motivation of older adults to volunteer, work which supports previous claims made by Choi (2003), as well as Becker & Dhingra (2001), and Ebaugh, Pipes, Chafetz & Daniels (2003). Choi (2003) conducted work in the US using national panel data which explored employment status and its effect on volunteering, showing a positive effect on volunteer time commitment. Griffin and Hesketh (2008) have also explored the role that work plays; both work prior to retirement and work during retirement effect motivation in volunteers. Also, Principi, Schippers, Naegele, Di Rosa, and Lamura (2015) explored the role that personal resources and access to resources play on the motivation of older adults to volunteer, showing that increased personal resources leads to increased volunteer action.

Literature in the area of volunteer behaviour is of broader context and examines the actions of the volunteers themselves, or proposes models of volunteer behaviour. Godbout, Filiatrault and Plante (2012) provide a systematic review of volunteer behavioural literature, conducting a meta-analysis of available work on this area. They identify areas which both positively and negatively

affect the voluntary engagement behaviour of older adults. Factors they identify as positively associated with volunteering in older adults include: person-linked elements, including personal values, perception of challenge, personal experience, being younger, being a woman, and self-rated well-being; environmental factors, including physical access, social possibilities, and institutional factors including job diversity and organizational structure; and occupation-linked factors, where the volunteer roles are similar to previous work roles. Factors negatively affecting volunteer behaviour included: negative personal feelings about volunteering; environmental factors, including strict environments, large families, and ageism; and occupational factors, including high costs associated with volunteering, and continuing to work full-time. Peters-Davis, Bruant and Braunschweig (2001) provide a volunteer motivational model which is meant to help explain behavioural choices in volunteers. The personal, environmental, and occupational rationales described by Godbout, Filiatrault and Plante in their meta-analysis are similar to Peters-Davis, Bruant and Braunschweig's model, which cites structural, cultural, personality, and situational factors as having effects on volunteer behaviour. Although the Peters-Davis et al. model is not specific to older adults, it is applicable here as those same factors can be applied to older adults (see Hamm-Kerwin, Misener, & Doherty, 2009 for an example of this application).

The research that focuses specifically on the transition to retirement in relation to older adult volunteers is less available than work on their motivations or behaviour. In this area we see specific studies on the influence of retirement transition on the willingness and ability to volunteer, how individuals anticipate this transition, and the influence that pre-retirement decisions about the value of volunteering affect volunteer choices during and after this transition (Mutchler et al., 2003; D. B. Smith, 2004; J. D. Smith & Gay, 2005). There is also some work on how the transition phase, as well as volunteer involvement in that phase of life, affects the

retirement pattern as a whole for individuals (J. D. Smith & Gay, 2005; Tang, 2015). This work shows that individuals who are involved in some part-time work are more likely to volunteer, and postulates that continued involvement with social groups and community connections through work is the catalyst for this. In addition to these areas, Einolf (2009) conducted comparative analysis between current retirees (baby boomers) and their generational predecessors to examine their relative volunteer commitments and showed generational differences between them.

Although research on the topic of health and well-being in volunteering is extensive, papers in this area focus primarily on three things, often within the same research articles: influences on mortality; overall well-being of older adult volunteers; and how specific experiences affect health outcomes for older adults. Dye and colleagues (1973) did comparative analysis between older adult volunteers and non-volunteers to establish health outcome differences in these populations. The work of Harris and Thoresen (2005) used Longitudinal Study of Aging (LSOA) data to show that consistent volunteering significantly reduced mortality in the sample. Jirovec & Hyduk (1999) explored whether the type and duration of volunteering had an effect on psychological well-being in older adults and showed that it did. Parkinson, Warburton, Sibbritt, and Byles (2010) showed how both psychological and physical health factors affected participation in volunteer activities by older women. Nimrod and colleagues (Janke et al., 2008; Kleiber & Nimrod, 2009; Nimrod, 2007b), have done work exploring the associations between leisure activities (including volunteer as a use of leisure time) and well-being. Their work has shown that well-being is positively associated with leisure participation, and that this increases with age. Van Willigen (2000) also explored the effects of volunteering across the life course, and showed that volunteering in later life had positive effects on health

# Older Adult Volunteers

## Individual Considerations

### Motivations

Explores issues of personal role loss/gain, post-retirement work, links between personal resources and motivation, religiosity and spirituality, access to opportunities, and broad factors.  
(see: Choi, 2003; Erlinghagen, 2010; Griffin & Hesketh, 2008; Krause, 2015; Tang & Morrow-Howell, 2008)

### Behaviour

Broad examination of volunteer behaviour, or proposals of volunteer behaviour models.  
Systematic review of behaviour literature – (Godbout, Filiatrault, & Plante, 2012)  
Volunteer motivational model – (Peters-Davis, Burant, & Braunschweig, 2001)

### Transition

Work exploring the major life transitions of older adults moving from the working world into retirement, and how this transition affects volunteer roles and desires among older people.  
(see: Einolf, 2009; Mutchler, Burr, & Caro, 2003; D. B. Smith, 2004; J. D. Smith & Gay, 2005; Tang, 2015)

### Health and Well-Being

Influences on mortality, overall well-being, and how specific experiences affect health outcomes for older adults.  
(Harris & Thoresen, 2005; Jirovec & Hyduk, 1999; Van Willigen, 2000)

## Organizational Considerations

### Retention

The ability of, and the best practices in, organizations to retain, develop, and utilize older adult volunteers.  
Maintaining satisfaction over time.  
(Hong, Morrow-Howell, Tang, & Hinterlong, 2009; Tang, Morrow-Howell, & Choi, 2010)

### Engagement

Issues of institutional facilitation of volunteering, encouraging continual volunteering through life changes.  
(Morrow-Howell, Hinterlong, Rozario, & Tang, 2003; Stevens, 1991)

Figure 2-3: Distribution of older adult volunteer literature divided by individual and organizational considerations



and well-being, and potentially delayed mortality. Interestingly, Nimrod and Shrira (2016), along with findings which agreed with Van Willigen, highlighted a paradox whereby aging individuals who would benefit most from leisure participation are also those with the most leisure constraints in the post-retirement age group.

### ***2.3.1.2 Organizational considerations***

Literature on the organizational side of older adult volunteers is divided into two categories, retention of volunteers (satisfaction) and recruitment of volunteers (engagement). Often found in the same articles, these ideas are represented in two ways: research which looks at institutional facilitation of the volunteer process for older adults; and encouraging continuity in roles and volunteer spaces to encourage older adults to participate. Work on the former reflects the ability of, and the best practices in, organizations to retain, develop, train, and utilize older adult volunteers within formal volunteer spaces (Hong et al., 2009; Morrow-Howell, Hong, & Tang, 2009). The latter focuses on encouraging continual volunteering through life changes, and issues of maintaining satisfaction over time for volunteers (Stevens, 1991; Tang, Morrow-Howell, & Choi, 2010).

### ***2.3.1.3 Community-based non-profits***

Community-based non-profit organizations are a specific sub-set of the non-profit organizational landscape, and it is important to understand what sets these organizations apart of their ‘non-community’ counterparts. This is not to say that other non-profit organizations are not active within communities, but the organizations discussed here do so in a specific way which merits categorization and explanation.

First we must understand what makes a community. Donna Hardina (2006) gives a succinct description of communities saying that they “consist of patterns of social interaction or

networks” (p. 10). Layer on top of this relationship-focused definition Smith’s (1999) localities of physical space and relationships and we are left with a location of loosely defined physical area, which is made up of personal and social networks tied to people and locations. Community non-profits, then, are organizations which are active directly in these defined spaces. They have a slate of characteristics which set them apart from other organizations which might be active in communities and these include: size of organization; strong reliance on volunteer labour; integration into community and social networks; and essential roles in those community and social networks. Each of these is significant in setting community non-profit apart from other non-profit.

Community non-profits tend to be smaller than their non-community counterparts. Although the reach of community non-profits may be very large, organizationally they tend to service a smaller client base, and have a smaller footprint than larger, cross-community organizations (Zabel & Hamilton, 2015). This is most easily explained as the difference in scope of practice between the locality of a food bank servicing a small city vs. a national cancer society or international cancer research fundraising organization; where both the food-bank and cancer society may be active side-by-side.

Due to their size, or their strong positions in local social and personal networks, community non-profits tend to rely primarily, and sometimes almost exclusively, on volunteer labour in order to maintain their operations (Alexander, 1999). Although when set to scale with larger organizations the ratio of paid employees to volunteers may look similar, a national fundraising program may have significantly more paid employees at the organizational level than the community non-profit. Because of this, clients and organizational volunteers tend to have more participation in the operations of the community non-profit organization as a whole, and

they are often better represented in top-level management spaces like boards of directors (Alexander, 1999; Hardina, 2006).

Perhaps because of, or at least in compliment to, their reliance on volunteers from the community they operate in, community non-profits are integrated into the social and personal networks of communities. They also carry, because of these close formal and informal network ties, essential roles in the community and social networks to which they contribute (Backman & Smith, 2000; Hardina, 2006). These strong local network ties mean that these types of organizations draw resources from, but also give back to their home community; both the draw-down and the investment of capital happen in the same place. We can then say that they are focused on the local, not looking to develop or build outside of that local community space. This context is potentially highly relevant for older adults looking to volunteer and invest in the community, as many of them have long-standing and deep social and network ties in these communities (Okun & Michel, 2006). The concept of being able to volunteer with the benefits showing at the local level would serve to legitimate and empower those community ties for these volunteers.

#### **2.3.1.4 Older adults volunteering in community-based non-profits**

Literature on the volunteering of older adults in community not-for-profits mirrors the research areas covered above, insofar as it addresses the individual and organizations considerations of volunteering. Work by McNamara and Gonzales (2011), in examining volunteer transitions in older adults, explored the value of older adults volunteers in community organizations. Citing work by Romero & Minkler (2005) and their own research, they described the value contributions that older adults make to community organizations, including management and leadership skills and abilities. Okun & Michel (2006) discussed how sense of

community was a significant factor in older adult volunteering, and that involvement in community-based groups was a significant contributor to that feeling. Peters-Davis, Burant, & Braunschweig (2001) examined factors associated with volunteerism and found that volunteers who perceived opportunities in organizations in their own communities, they were statistically more likely to volunteer overall.

In addition to research on community-based not-for-profits in general, there is a growing body of literature which focuses on community sport organizations. Although not the specific focus of this study, work on older adult volunteers in community sport can help illuminate processes and volunteer factors which are present across the spectrum of not-for-profit organizations. Primarily this work addresses unique needs and outcomes from participation of older adult volunteers in the sport sector. Hamm-Kerwin and colleagues (2009) used the Peters-Davis et al. (2001) work to inform interviews with older adults yielding results indicating that older volunteers in sport have large social networks, past involvement in sport, and a history of volunteering. Mead (2009), in her dissertation on volunteers in sport and non-sport contexts highlighted that sport volunteers did so as a way of continuing to engage with their sports and stay connected, and that for some it was necessary in order to keep the club they were involved with going. Cuskelly (2004) in his work on volunteer retention in community sport, highlights the different levels of engagement organizations see from older adults and suggests some possible reasons for these discrepancies.

In addition to the work on older adults in sport volunteering, there is a small body of literature on sport volunteering in older adulthood as serious leisure. Work in this area is focused on how the volunteering of older adults can be conceptualized as serious leisure in a way that is

unique to older populations, and the theoretical implications of that designation (K. Chen, 2014; Heo, Lee, McCormick, & Pedersen, 2010; Misener et al., 2010).

## **2.4 Meaning Making**

Research on meaning and meaning making appears across a variety of fields with a broad range of meanings. For this study, the concept of meaning-making is a stand in for the complex interactions of personal needs and desires which make up the individual's measures of self-worth, community concept, and the way they identify themselves as a person. This complex interaction of self-concept, both individual and as part of the larger social/universal order, tries to answer the questions of "who am I?", "what is my place in the world?", and "why do I matter?". Work on meaning making which focuses on the associative meanings of words and pictures (e.g. teaching and learning / child development) is excluded, as this type of meaning making is more literal than the socio-emotional focus here. Looking specifically at the development of existential and personal meaning through life experience, contemporary meaning based literature is present in health research (e.g. Meert et al., 2015), feminist studies (e.g. Rakow, 2015), business and industry studies (e.g. Lowe, Rod, Hwang, Johnston, & Johnston, 2016), religious studies (e.g. Page, 2015), among other fields. With this wide range of research focus on meaning, it is difficult to pin down broadly applicable definitions on meaning and meaning-making. This thesis, and the definition above are framed by the work of Susan Nolen-Hoeksema and colleagues (Davis, Nolen-Hoeksema, & Larson, 1998; Davis & Nolen-Hoeksema, 2001; Nolen-Hoeksema & Davis, 2002) where the derivation of meaning comes from two constructs: benefit-finding, where meaning is about significance; and sense-making, where meaning is about the comprehensibility of situations and settings. Understood as a transitional node for individuals as they age, retirement is a significant life transition which requires individuals to engaged with

both benefit-finding and sense-making. This concept of meaning making is further informed by the work of Theron and Theron (2014) who explain how meaning making is inherently an intrapersonal process, but that it is also contextualised to the individual and their cultural setting. This element is of particular importance as it provides additional support to the exploration of meaning making through the lived experiences of individuals in qualitative research such as this.

The extant literature which is most relevant to older adults and the role that major transitions play on the individual is that in identity development, as it speaks to the role that events and actions play on the understandings of individuals about the self and personal actions. In their work on emerging adults, McLean and Pratt (2006), referencing the theoretical work of Habermas and Bluck (2000), call this “the use of a form of autobiographical reasoning to think about a life experience” (p. 715), and applying this reasoned thought to changes in personal action and ideas about the self.

Work which focuses specifically on meaning-making and volunteerism is sparse. Schnell and Hoof (2012) published a paper on this topic which highlighted that meaning-making as a function of volunteering is generally unavailable in the literature, and proposed the application of a hierarchical-based model of meaning-making to the influence of volunteering on personal meaning. Schnell and Hoof cited the works of Andersson and Öhlén (2005), and Golüke, Güntert, and Wehner (2007) which used work with hospice volunteers to establish the derivation of personal meaning through personal interactions, and development of personal competence and well-being. Iwasaki, Messina, Shank, and Coyle (2015) gave an exploration of leisure in meaning making for adults with mental illness in which volunteering featured as one element of how participants made meaning. Porter, Iwasaki, and Shank (2010) identified meaning-making themes within the leisure literature (which includes work on volunteerism) and these themes

included identity, freedom, and connections. Shaw and Henderson (2005) explored leisure and leisure practices (including volunteering) as a meaning-making space from a gendered perspective.

Scholarly work on meaning is most broadly developed in the fields of psychology with work being conducted in clinical psychology (e.g. Adler, Harmeling, & Walder-Biesanz, 2013), cultural psychology (e.g. Mendoza-Denton & Hansen, 2007), positive psychology (e.g. Steger, 2012), emotions (e.g. King, Hicks, Krull, & Del Gaiso, 2006), and health psychology (e.g. Brandstätter, Baumann, Borasio, & Fegg, 2012). Each of these approaches to the study of meaning differ slightly with primary focus on the foundational principles of the psychological sub-disciplines, from the direct implications to health of patients having meaning in life from Brandstätter et al. (2012), to Steger's (2012) work on the implications of searching for life meaning on the psychological outcomes of the individual. Included in the psychological research is work which develops models for meaning-making. For example, Park's (2010) meaning-making model provides a systematic way of exploring the role that stressful situations have on the making of meaning within situations, and the possible implications to the global meanings held by individuals.

Taken together, the work on meaning making is extensive and spread across a variety of fields. With this in mind, the application of this literature to the diverse context of the transition to retirement requires the synthesis of a contextual definition like the one provided here. Focused on the intrapersonal processes of benefit-finding and sense-making, with a contextual understanding of the retirement transition space will allow for deeper understandings of the meaning making process in this work.

## 2.5 Summary

The transition into retirement is a complex set of circumstances involving personal, social, and community expectations and desires, which confronts older adults as they plan for and/or experience this time in their lives. Having explored the meaning of retirement, as well as the technical and social definitions of retirement, context was provided for looking at the normative expectations of retirement and retirees in North America. Following the basic understanding of retirement and its normative expectations, existing theories about how the transition to retirement is experienced and approached, including role, activity and continuity theories were described, as was work on the difference and effects of volitional versus non-volitional retirement. With these understandings in place, literature on older adult volunteers and their roles in community-based non-profits was examined. Finally, work on the concept of meaning making was explored, providing a synthesised definition of meaning making for the purposes of this study.

Together, these areas of literature provide a foundation for posing questions and exploring issues within the population of older adults who chose to volunteer in the transition to retirement. This growing group and the organizations which both serve and take them on as volunteers benefit from continued scholarship in this area, and the study that follows is intended to illuminate individual experiences through this transition process.



### **3. Methodology and Methods**

The following chapter contains a description of the methodology and methods which were employed for this study. Included in this chapter are: a description of the sample population; a complete description of the study design; the methodological approach to data collection and justification for that methodology; procedures for data analysis; a researcher statement; and ethical considerations in the study.

#### **3.1 Purpose Statement**

The purpose of this study was to understand the meaning of volunteering for older adults during the transition from paid work to retirement, and how this affects the nature of their volunteer involvement.

#### **3.2 Research Questions**

The research addresses the following question:

What role does the volunteer experience play in meaning-making during the transition to retirement among older adults?

#### **3.3 Methods**

##### **3.3.1 Sample population**

The sample for this study was drawn from the population of older adults volunteering in community-based non-profits in the Kitchener-Waterloo-Guelph region of Ontario. For the purposes of this study, “older adult in transition to retirement” was defined as follows:

- Adults over 55 years of age
- Who are recently retired (i.e. within the last five years), or are currently engaged in a retirement process through gradual job exit or job reduction to retirement

- Who are engaged as a volunteer with a secular community-based not-for-profit organization
- Who are habitual/continual volunteers – meaning that the volunteering they are engaged in is recurring and regular over the course of time (rather than a one-time experience such as an event volunteer)

Participants were required to meet all of the above criteria in order to be considered for participation in the study.

For the purposes of this study, the interest is volunteering in secular (vs. faith-based) organizations. Previous research comparing these types of organizations has shown significant differences in funding sources and preferences, organizational culture, leadership, decision-making processes, and staffing (Ebaugh et al., 2003). There is some discussion in the literature that those who volunteer exclusively in faith-based settings may be doing so because of specific motives and normative expectations tied to religious affiliation (Becker & Dhingra, 2001; Brooks, 2003; Ebaugh et al., 2003), and thus the current thesis will exclude this type of volunteering. This information notwithstanding, research comparing individuals who self-declared as secular or religious found that self-declared religious people volunteer more than twice as often per year (average of 12 times per year versus 5.8 times) than secular people (Brooks, 2003), and multi-country research at Queen's University found that more Canadians (about 40%) volunteer for secular organizations than their religious institutions (about 19%) (Uslaner, 2002). Both of these findings being true indicates that involvement in religious organizations may also increase volunteer behaviour outside of religious organizations (Jackson, Bachmeier, Wood, & Craft, 1995; Ruiter & De Graaf, 2006). Given this last point, individuals who participate in religious volunteering along with other secular volunteering will not be

excluded from this research, but those who volunteer exclusively with religious organizations will be excluded in order to narrow the scope of study.

### **3.3.2 Theoretical underpinning and methodological choice**

Grounded theory involves a complex set of research approaches which are important to understand before undertaking this research process. Since its development in the 1960s, Grounded theory has developed several distinct offshoots, each of which finds a place in the academic and methodological research literature. Grounded theory has its roots in the work of Glaser and Strauss (1965; 1966; 1967) who developed a rigorous set of methods for gathering and analysing research data, and generating novel theoretical models from that data. This rigorous methodology, now most commonly known as ‘classic grounded theory’ was developed as a way of lending credibility to developing qualitative methodologies in a research setting which was staunchly quantitative at the time. Grounded theory is now a complex web of interconnected processes which serve as both methodology (design process linking methods and outcomes), and methods (techniques employed for data collection and analysis) (Crotty, 1998).

Since the development of grounded theory by Glaser and Strauss, this methodology has split into three significant deviations, with some researchers adding a fourth category which adds layers of complexity. In his work on grounded theory for novice researchers, Gary Evans (2013) lays out these deviations concisely. For Evans, the three significant types of grounded theory are as follows: classic grounded theory, still championed by Glaser, this type of grounded theory sticks as closely to the methods laid out in the early work of Glaser and Strauss as possible; grounded theory as championed by Strauss and Corbin (1990) (Evans calls this Straussian grounded theory and Mills, Bonner, & Francis (2005) call this “evolved” grounded theory) which departs from classic grounded theory in that researcher ideology is taken into account --

“No researcher starts with a totally blank sheet” (Evans, 2013, p. 43), verification is explored differently, and structural conditions and context are explored differently. The third type is constructivist grounded theory, popularized by Kathy Charmaz (Charmaz & Smith, 2003; Charmaz, 2006), this approach to grounded theory uses a constructivist epistemology to approach the development of grounded theory in order to move this methodology away from the objectivist roots of classical and Straussian approaches (see basic chart – Table 3-1). In addition to laying out these three approaches, Evans (2013) adds feminist grounded theory to the mix, although he describes this approach as a layering of feminist methodology and ideological principles onto a grounded theory which borrows methods from other approaches without prejudice.

Although each of these approaches has merit, and each can yield valuable research data if done correctly, this study will take the form of a constructivist grounded theory (cf. Charmaz, 2006). The flexibility inherent in this type of grounded theory, along with the recognition that the researcher cannot be disconnected from the research, align closely with my perspective on my role as a researcher, and provides a better match with my epistemological approach to research than does a purely objectivist approach.

Constructivist grounded theory is most often attributed to Kathy Charmaz (Charmaz & Mitchell, 2001; Charmaz & Smith, 2003; Charmaz, 2006; 2011; Charmaz & Belgrave, 2012), but other authors like Anthony Bryant (2002; 2007; 2009), and Jane Mills and colleagues (2008) have also made contributions to the establishment and solidification of this methodology.

Table 3-1

Approaches to Grounded Theory - Summarized from Evans (2006)

	<b>CLASSIC GROUNDED THEORY</b>	<b>STRAUSSIAN GROUNDED THEORY</b>	<b>CONSTRUCTIVIST GROUNDED THEORY</b>
<b>EPISTEMOLOGICAL VIEWPOINT</b>	Objectivism		Constructivism
<b>RESEARCHER ROLE</b>	To observe, abstract, and theorize based only on data	To observe, abstract, and theorize based on data with the understanding that researchers cannot be completely disconnected from the research process or topic	To observe, abstract and theorize based on data while integrating researcher biases, perspective, and influence on the data, understanding that these things must affect the process
<b>LITERATURE REVIEW</b>	Observations and theories should be generated independent of existing work in the field	The researcher cannot be completely devoid of information and expertise and these things must be buffered	Review of extant literature is acceptable as researchers influence research topics and outcomes in all cases
<b>CODING PRACTICE</b>	Initial → Focused → Theoretical	Initial → Focused → Axial → Theoretical	Initial → Focused → Axial → Theoretical
<b>THEORY DEVELOPMENT</b>	Developed through abstraction of analysed data only	Developed through abstraction of analysed data buffering for researcher influence	Developed through analysis of data using researcher bias as one factor in theory development

For Charmaz (2006), methods in grounded theory consist of “systematic, yet flexible guidelines for collecting and analysing qualitative data to construct theories grounded in that data” (p. 2). Her methodology follows the roots of grounded theory closely in that it: has simultaneous data collection and analysis; codes come from the data, not existing theory; uses the constant

comparative method in analysis and research decision making; uses memo writing as both organizational method and as data; and holds that the majority of literature review should be undertaken after analysis. What differentiates the constructivist grounded theory is that within this paradigm, neither theory nor data are discovered as raw, unaffected, and void of researcher influence, but each are affected by the researcher and their own experiences. In this way, Charmaz makes a significant departure from other types of grounded theory, saying that the researcher cannot be objective in the collection and analysis of data, that previous experience and expertise will always be a lens through which the researcher sees their research.

This philosophical point of difference in particular has caused a rift within grounded theory itself. Reminiscent of the split between the founding authors of grounded theory Glaser and Strauss, Charmaz's grounded theory has elicited sharp criticism from those who practice classic grounded theory. Glaser (2007) has written strong criticism of Charmaz's approach, saying that it is not truly grounded theory and calling it Qualitative Data Analysis instead. This distinction is important for Glaser, as he says Charmaz's version of grounded theory imposes the "worrisome accuracy problem" of qualitative data analysis on a process which is meant to generate "abstractions [which] become independent of the researcher" when done correctly. Both Charmaz and Bryant have responded to Glaser's comments, with Bryant (2007) rebutting many of Glaser's constructivist critiques by asserting the difficulties inherent in Glaser's objectivist ideological approach.

### ***3.3.2.1 Justification for methodological choice***

Having explored the debate related to different "schools" of grounded theory methodology, I place myself with Charmaz in my own approach, as it is clear to me that my previous experience (academic, professional, and personal) and knowledge will affect my

research in process. In addition, the flexibility provided by the constructivist grounded theory does not exclude exposure to subject matter and literature on the topic being studied, and therefore opens up this type of study in areas where the researcher may already have some familiarity.

In this case, my involvement in previous research on older adult volunteers has exposed me to research on the motivational aspects of older adult volunteering (study in progress with Drs. Misener and Berbary). Although this research was specific to community sport, reading in this area can inform other work with older adult volunteers. Since this study is explicitly focused on older adults during their transition to retirement, there are currently no robust theoretical models which can be applied or effectively used in this area which are specific to this topic. For this reason, informed grounded theory taking from Charmaz is appropriate.

It was expected that findings in this study would come together with previous social psychological theoretical explanations for volunteer motivations. Theories of motivation including Role theory, Activity theory, and Continuity theory covered in this document were expected to provide context for novel theory on transition to retirement and volunteerism. These theories proved inadequate based on the data gathered in this research project, but did provide some appropriate theoretical grounding to understand some parts of the research data.

This inclusion of existing theoretical perspectives is conducive to Charmaz's constructivist grounded theory where "the categories, concepts and theoretical level of an analysis emerge from the researcher's interactions within the field and questions about the data" (Charmaz, 2000, p. 522). Additionally, constructivist grounded theory allows these theories to exist alongside the research without being prescriptive about the outcomes or generation of new theory associated with the study's phenomena. Different from the application and/or testing of

existing theory which compares and associates data to existing theories to see if there is a match, this approach allows the data to speak to new theory generation which is specific to the study topic area.

### **3.3.3 Study design**

This study employed a constructivist grounded theory methodology to explore the volunteer experiences of adults who have recently transitioned to retirement, or are in the process of transitioning to retirement. The study used in-depth one-on-one interviews, as well as research memos, and available literature on transition to retirement to generate a theoretical model which reflects volunteering in this transition phase of life.

### **3.3.4 Data collection**

Data for this project came from in-depth, one-on-one interviews involving myself and participants. Interviews were audio recorded. Research notes were taken during the interviews to supplement the audio recordings. In addition to these research notes, personal notes were also taken which have a role in the space and circumstance framing of data analysis (Charmaz, 2006; Mauthner & Doucet, 2003). Research memos were used to track analysis during the course of the project, and refine the coding scheme in order to bolster continuity in research practice and credibility of research findings (Charmaz, 2006). The sample period was March 2016 – May 2016 to allow for constant comparative processes and iterations between data collection and analysis.

Initial participant recruitment was done at the organizational level. First, community volunteer organizations which manage connections between other organizations and potential volunteers were approached. The Supervisor, Community Engagement, in the Department of Community Engagement, Guelph, Ontario – this individual liaises with community organizations



which are active locally in the Guelph community and are connected to the municipality in some way; as well as the Volunteer Centre of Guelph/Wellington and the Volunteer Action Centre of Kitchener Waterloo and Area, which keep databases of local community organizations as volunteer opportunities were contacted. These contacts were sent the organizational recruitment letter (Appendix A), which was attached to an email message giving a basic outline of the research request. The organizational letter, along with giving a full overview of the proposed research also outlined possible organizational benefits from research with their volunteers. With each community volunteering management organization contacted, the request was forwarded to their volunteer coordinator, and access was granted to the organizational contact database. In addition to this database access, these organizations passed on participation information to the volunteers in their own offices.

The organizational contact databases were accessed through an online portal. Information in this online format provided organization name, a basic description of the work of the organization, and contact information including a direct email link. These entries were scanned for appropriateness based on the study criteria of community organizations which were active at the local level, were secular, and had contact information available in the database. In total, 27 organizations were contacted by email. Emails included a basic overview of the proposed research, the researcher contact information, the organizational information letter (Appendix A), and the individual recruitment letter (Appendix B) which was written for direct distribution to potential participants. The participant letter was included in this initial contact to limit the amount of time that the organizational contact person would need to spend working with the researcher, and hopefully encourage direct passing on of study information to potential participants.

Access to potential participants through organizational contacts yielded approximately 18 potential participants who contacted the researcher directly after receiving the study information through their volunteer organization. Each of these participants was contacted by email by the researcher to confirm that they met the complete study criteria. This first round of communication reduced the number of eligible participants to 11. The remaining potential participants were then engaged in a scheduling discussion to book a time for an in-depth interview. Interviews were successfully scheduled and carried out with 10 of these potential participants. Scheduling conflicts prevented an interview with the last potential participant in this group.

Once interviews were underway, snowball sampling was employed to access additional potential participants. This yielded an additional eight potential participants, of which five were successfully interviewed for this study. The same contact regimen used with potential participants from organizational sources was employed with potential participants from snowball sources, including confirming eligibility and interview scheduling.

An interview guide was prepared for conducting participant interviews (Appendix C). The structure and questions of that interview guide are informed by the psychological and motivational theories outlined in chapter two of this document and the methodological framework provided by constructivist grounded theory (Charmaz, 2006). Life Course Perspective uses the concept of trajectories and decision making to explore patterns and deviations, and the transitions which occur during the life span. Prompts reflecting the role of life trajectory and decision making are informed by this perspective. Prompts about roles, activity, and continuity are informed by those respective social psychological theories. The foundations of these theories allow for prompts which are reflexive of existing literature, but not directly guided

by existing concepts or conceptual models. This interview guide was flexible, and modifications to its structure were ongoing based on analysis undertaken while the interview phases of the study was in progress. All interviews were audio recorded with permission from participants (appendix D). Audio recordings were then transcribed in individual documents. In total, 15 interviews were conducted which resulted in 14 hours 57 minutes of recorded interviews. Interviews yielded 310 pages of transcribed data, totalling 13206 lines.

Finally, data collection was supplemented by memos taken by the researcher after and between interviews (see example in Appendix E). These memos consisted of both analytical memos, which outlined the process of analysing and re-analysing the data as the research process was underway, as well as personal memos which were more reflexive of the researcher's personal feelings about the research and the research process. These memos were used in the collective data analysis of the project to help maintain continuity and ground the researcher in the theory and process used in analysis.

### **3.3.5 Data analysis**

As this research is rooted in constructivist grounded theory, the methods of data analysis mirrored those recommended for this type of research. This research process included analysis of transcribed interview texts through various levels of coding, the writing and analysing of research memos - both personal and analytic, the constant comparative process which allows the researcher to use in-process research and analysis to modify and enhance continuation of the research project, and continued data collection until the researcher reaches some form of theoretical saturation which allows for the generation of theory on the study area (Charmaz, 2006).

The coding of research data is vital to the work of grounded theory in that it is representative of the idea abstraction which is required for the generation of theory through the research process. Although some differences in coding and the coding process exist between the forms of grounded theory, constructivist grounded theory approaches coding in four ways: initial coding, focused coding, axial coding, and theoretical coding (Charmaz, 2006). Initial coding is the first stage and revolves around questions of what the study is about, who's point of view it is from, and what theoretical area does the data indicate (Charmaz, 2006, and Glaser (1978) in Charmaz (2006)). Initial codes are “provisional, comparative, and grounded in the data” (Charmaz, 2006, p. 48). Following initial coding is focused coding. These codes are more conceptual than codes presented in initial coding, they are more selective in their content, and they are more directed in how they reflect the theoretical development of the study (Charmaz, 2006). By these attributes, they are better able to explain larger segments of the research data.

Next come axial and theoretical codes. Axial codes, first presented by Strauss and Corbin (1990), are thematic in nature and connect codes around the “axis” of a categorical area. In essence, axial codes allow for the connection of ideas into a larger category which helps in the development of that categorical separation into theory (Charmaz, 2006). Theoretical codes exist alongside axial codes, and proponents of theoretical codes (especially Glaser) argue that the functionality of theoretical codes renders axial codes unnecessary. Theoretical codes are divided into major thematic groups to allow for better differentiation between concepts, and focused codes can be placed directly into the theoretical code framework (Charmaz, 2006).

This study employed initial coding centered on the major themes inherent in the research purpose and questions, including but not limited to: form of retirement; volunteering (type of, and time); motivation; and personal feelings. Then focused coding as laid out by Charmaz (2003;

2006). Focused codes included but were not limited to: volunteer roles; freedom; social motivations; past work; and loss of purpose. Axial coding was then used in order to open the process to unique codes, which are not present in theoretical coding. This should allow the axial codes to be less prescriptive and emerge from the data. These included fear/anxiety, motivational pathways, time use, planned and pushed exits.

The method of constant comparisons, as well as active reflexivity were employed during data analysis. Both of these were carried out throughout the working life of the research project, reflecting the constructivist nature of the methodology (Charmaz & Belgrave, 2012; Denzin & Lincoln, 2011; Denzin & Giardina, 2009; Mauthner & Doucet, 2003). Largely, this meant ongoing analysis of notes taken and information gathered during interviews and surrounding interviews via the use of memos, with the intent of reaching theoretical saturation of the concepts explored in the research questions. Analytic memos are used as an ongoing process throughout research which allows the researcher to work through, in a systematic and recorded manner, the development of their research project and thought processes (Berbary & Boles, 2014; Charmaz & Smith, 2003; Charmaz, 2006). Doing so allows them to identify points of focus in the research and data gathered so far, but also to identify gaps in literature, understanding, analytical practice, or research design (Charmaz & Smith, 2003; Charmaz, 2006). They allow for researcher reflexivity in a way that may not be available to the researcher while immersed in a project, particularly in that researcher is working alone (Mauthner & Doucet, 2003). In this project, reviewing the interview data and research memos allowed the identification of common patterns. These patterns were repeated as interviews continued, and produced a level of theoretical saturation which was sufficient to make basic conclusions about the research data.

### **3.3.6 Role as the researcher**

As the primary researcher, I enacted a variety of roles during the course of this project. I served as the main contact person for all participants, participating organizations, and ethics review board throughout the study process. I conducted all study interviews, as well as interview planning and follow-up. Using the theoretical and analytical framework as described in this document, I analysed the research data obtained through the research process, synthesised research findings, and wrote a discursive analysis of those findings.

As of this writing, I have two healthy older adult parents, one of which is retired and the other in transition to full retirement. Both of them spend time volunteering, although my mother far more than my father. Their time spent volunteering, both formal and informal, is significant to them and they reap many of the positive benefits described in this document from these activities. As healthy, active older adults, they attribute some of their well-being to being able and capable of working in the community as volunteers. From a personal perspective, understanding that academic work has shown increased well-being and longevity linked to volunteering as an older adult makes me want to push them to maintain or expand these commitments. The best way to encourage them and others, is to understand why individuals in their age cohort volunteer and what motivates them to continue.

My interest in this topic is not altruistic. The reading that I have done makes me believe that involvement with other organizations, and the personal and social networks that this type of activity maintains, are keys to the longevity of individuals as they age. It also contributes to emotional and physical health of older adults. Maintaining their health, for me, is as much about delaying their mortality as anything else. Beyond that, I see some of the theoretical pieces that I have discussed in this document playing out in their lives and the lives of their friends, and I

understand that I saw some of these even before this research is complete. I have watched my parents and their friends pick up leisure and volunteer activities as they have moved into retirement or during retirement in order to maintain contact with their communities. They have also maintained relationships which invariably has helped their psychological well-being.

Many of the retirees I interviewed were long-time volunteers who have continued volunteering after their retirement. They value their time in these positions, and speak willingly and directly about their virtues. I had expected that some combination of the theoretical underpinnings of life course trajectories, and maintenance of roles and activities would be present in my sample. This was true, but was not as pervasive as I had anticipated.

I learned through this process the value of maintaining close ties to my research supervisor. Being able to consult with someone about the myriad changes required to complete this research and this document allowed me to be successful and reinforced the value of external eyes on individual research. She provided critical assessment of findings as well as research process, and certainly made my research better.

### **3.3.7 Ethical considerations**

Ethical issues are possible in any type of research. In this type of research in particular, open discussion with human subjects has the possibility to develop ethical challenges. Rigorous interview protocols were in place to ensure that data collected is consistent across the sample. Each participant was given an information letter at the outset of the process for them to review by email (Appendix B). They were also given a paper copy of this information document at the beginning of their interview. Prior to starting their interview, they were given a paper copy of a consent form (Appendix D) to review and sign. All participants were given the option to have the information letter and consent form read to them by the researcher. One participant chose to have

the form read to them prior to signing. In each interview, participants were afforded the time to review the documents in detail prior to starting the interview. Participants were then asked to sign the consent form and return it to the researcher. The information in these documents included statements that participation was strictly voluntary, that participants may remove themselves and their data from the study at any time, and contact information for the researcher, the research supervisor, and the ethics review board of the University of Waterloo.

In the analysis and research reporting, all participants were given a pseudonym in order to protect their anonymity. In addition, the names of any organizations involved in the study or mentioned by the participants were also given pseudonyms.

Data collected during this study was and will be kept private at all times by me, and in storage by the research supervisor. Any paper documentation is kept in a locked cabinet, and electronic media is kept in password protected files on standard and removable media devices.



## **4. Findings**

The data for this study consists primarily of individual interviews conducted with a sample of older adult volunteers who had recently retired, or were in the process of transitioning to retirement. Additional data was collected in the form of personal and analytic memos taken throughout the research process. The research was designed to seek out the personal representations and understandings about this complex life transition directly from the individuals involved in the process of moving into retirement and the role(s) that volunteering played during this time.

The study was guided by the central research question: What role does the volunteer experience play in meaning-making during the transition to retirement among older adults? In response to this question, the findings of this study shed light on why older adults who are engaged with regular volunteering choose to do so, and how their volunteer work is influenced by and influences their meaning about the self and their personal social roles.

This section will begin with a demographic profile and an overview of volunteer involvement of the participants in the study. Following the demographic information, the findings will be presented, which outline meaning-making for older adults through volunteering in the transition to retirement. Lastly, this chapter includes a section on the organizational information which participants shared relevant to volunteer recruitment and retention.

### **4.1 Demographic Profile**

The participants in this study share a few things in common. They are all over the age of 55; they are all retired, or are in the transition phase to full retirement where they engage in bridge work, which is non full-time work done after retirement from a main career which can include reduced hours at the same job, new work in the same field (i.e. consulting work), or a

completely new position (i.e. Walmart greeter); they all live in medium-sized communities in southern Ontario, Canada; they are all white. Their stories of volunteering are varied given their different work experiences prior to retirement and different organizations with which they volunteer. This contributes to the diverse personal experiences shared in this study. The information in Table 1 gives a snapshot of the participants in this study, and includes the following information:

**Name** – initials given to participants in this study are not the initials of the participants themselves in order to maintain confidentiality

**Age Range** – Age is given as a range (55-60, 60-65, 65-70) in order to provide groupings if necessary, and to maintain confidentiality for participants.

**Gender** – Participant gender is shared here for informational purposes only and was not used as part of the analysis in this study. The study consisted of nine women and five men.

**Number of years since retirement** – This is included to help contextualize the number of years since retirement for participants in the study. It is closely linked to the next column referring to bridge work as participants often classified themselves as retired, even if they were working part-time in another role. For example, teachers who stated they have been retired for more than 5 years, but still engage in regular supply teaching in their field would be classified as *in transition* to retirement and would not be fully retired. They are therefore included in this work.

**Retirement was planned?** – The participant had a retirement plan, which included a designed exit from work, which they implemented.

**Main Work** – Type of work this participant did for a living prior to retirement.

**Current volunteer role(s)** – Type of volunteering the participant is currently doing.

**Volunteer before retirement** – Participant engaged with regular volunteering prior to retirement.

Table 4-1

*Demographic and Volunteer Data of Study Participants*

Name	Age-Range	Gender	# of years since retirement	Was retirement planned?	Main Work	Current Volunteer role(s)	Volunteer before retirement
HA	60-65	F	5	N	Manager, Local Business	Front Desk	Yes
DK	60-65	M	3	Y	University Administration	Driver	Yes
LM	60-65	F	2.5	N	NFP Management	Hospice	Yes
RL	65-70	F	>1	Y	Therapist	Refugee / child care	Yes
BJ	60-65	F	1	N	Crown Corporation	Care of under-homed	Yes
ML	60-65	F	1	Y	Sales	Literacy	Yes
WE	65-70	F	1	N	Sales	Tutor / driver	No
JP	60-65	M	4	Y	Computers	Photo	Yes
VM	60-65	F	>1	Y	Coach	Community Centre	No
DA	65-70	M	5	Y	Teacher	Child care / refugee	No
CM	60-65	M	11	Y	Teacher	Trails / Theatre	Yes
HE	65-70	F	4	N	Clerical	Clerical / local council	No
GD	65-70	M	>5	N	Sales	Local theatre	Yes
CJ	65-70	F	3	Y	Administrator	Child Care / Suicide Awareness	No
MB	65-70	F	5	Y	Teacher	Coordinate Community Dementia project	Yes

## 4.2 Meaning-making through Volunteering

The findings outlined in the following section provide insight into the main research question: *What role does the volunteer experience play in meaning-making during the transition to retirement among older adults?* Through inductive analysis of the data, it was evident that volunteering has a meaningful influence on an older adults' sense of personal identity through

the transition to retirement, as well as their perspectives on health and aging. Meaning-making through volunteering of the older adults in this study is divided into the following sub-themes: personal agency and role identity in the retirement transition; confronting perspectives on aging, health, and dying; the complexities of time use; facing fear/anxiety about transitioning to retirement; and making a difference in people's lives.

It was also evident that the meaning older adults derived from their volunteer experience was highly dependent on the circumstance of their transition to retirement. Experiences were similar among those with developed and executed retirement plans, in contrast to the experiences of those who felt that they were forced or pushed into retirement in some way. The participants were almost evenly split between these groups, which created a notable contrast for analysis within some themes. This particular factor (whether or not their transition to retirement went according to a plan) was more influential in their meaning-making process than other factors including whether they transitioned quickly or over several years, or the particular occupation which they held prior to retirement. About 60 percent of participants ( $n=8$ ) had developed retirement plans which they executed (the *planned* group). These retirement plans varied, with some being 'working one day – gone the next' retirements, and others being gradual transitions through part-time work or diminished duties. The other group ( $n=6$ ) were those who felt they were pushed into retirement before they were expecting to leave their "normal" working lives (the *pushed* group) based on factors imposed by others (e.g., organizational re-structuring) or personal circumstances that compelled them to retire earlier than expected or without a plan (e.g., medical reasons). When relevant, these factors will be included in the analysis below.

## **4.2.1 Role identity in the retirement transition**

For all of the participants in this study, volunteering was a way to maintain a role or give purpose to some of their activity as they moved through transition to retirement. For each of the participants, what motivated them to engage with volunteer work was different, but they shared a need for agency/control over their time and choices while they volunteer. When examining the role identity and personal agency for these older adults in transition to retirement we see difference in the type of volunteer activity planned retirees engage with versus pushed retirees, and this reflects differences in how they make meaning in those volunteer roles. However, we also see commonalities between the groups and we begin there.

### ***4.2.1.1 Autonomy***

Across the study sample, participants expressed a need for autonomy over their time and positions as they engaged with volunteer work. Volunteering allowed them the flexibility and decision-making power required to balance giving of their time versus having time for self, and the perception of autonomy meant that volunteering could be a tool by which they managed their desire to be engaged in the lives of others, and their desire to have personal freedom.

Participants believed that personal freedom was an integral part of retirement. One participant described retirement and its relationship to volunteering as “a great period of your life when you can do what you want to do and not what somebody else is telling you you have to do. That’s the one thing about volunteering is that you can say no, I don’t want to do it” (WE). Another participant explained how autonomy fits into that definition succinctly, “[in retirement] ‘can’ and ‘have to’ are, they’re choices really” (CM). The discussion about choice, the autonomy of decision making about when and how much of their time they would commit to volunteering, factored into many participant’s decisions about volunteering. They were motivated to volunteer,

in part, because they could choose what they did, and how much they did it, and had the flexibility and ability to remove themselves if the work no longer suited them – “life becomes more self-centered. I want to take off and travel when I want to take off and travel ... making me less available and reliable as a volunteer” (RL). Having the autonomy to make time-use decisions allowed many of the participants in this study to see volunteering as an effective use of their time, and a worthwhile part of their routine and personal history. However, the ability to divest themselves of volunteer commitments, or change the amount of time they spent on these tasks, allowed them to maintain the freedom which was important to them as part of their retirement.

#### ***4.2.1.2 Role identity***

Beyond the need for autonomy as a marker for what it means to be a retired person who volunteers, it was clear that participants engaged with their volunteer work as a means to establish or maintain personal role identity through their transition to retirement. How participants engaged with role identity, and how this reflected their personal circumstances, was less universal than the need for autonomy, and here we see a significant and important split between the two groups of retirees.

The group of participants who had a planned exit from their jobs, (i.e. those who chose their own exit path and time), expressed some common ideas about the transition from work to retirement, and the meaning of this transition for them. Each of them, even though the volunteer tasks varied in nature between participants, held primary volunteer commitments which looked very different from their primary roles while working. One participant who had been a university administrator took a role as a driver where he could be almost completely anonymous, avoiding the trappings of recognition and significant responsibility. Another participant who had been in

high level sales for her career, took a position working with children in a literacy program, an activity far outside of her comfort zone prior to starting with the program. Another participant from this group returned to hospice volunteering after many years away, a role which was nothing like the corporate management she was engaged in with while working.

The choice of volunteer roles that planned retirees discussed in their interviews was linked to the way they experienced the end of their working lives and their readiness to seek out other roles. Some of them were emotionally finished working in their work environment or role, spaces which were no longer positive for them. One participant described “a sense of ... you kind of just feel numb with work after a while” (DK), and another stated that “I didn’t for a minute regret my decision to leave work, not for a minute. ... I think it still would have been positive but because work wasn’t good at the end, it was such an unhealthy environment to be in, I didn’t even hesitate” (BJ). Participants in this group were looking for something different to do in their lives.

For planned retirees, there was forethought and design in the cessation of work, and what activities would follow the end of regular working life; “when I started thinking about retiring, I began to realize that I don’t want to be tied down to something that I need to attend every week on a regimented pattern” (JP). Having thought about their work, as well as what they were interested in for post-work life, they were able to have retirement be different from their working lives and are able to derive personal meaning from these new and different roles.

In contrast, individuals who felt they were pushed into retirement transition tended to choose a different path to volunteering. Their main volunteer roles were similar to the roles they occupied in their careers. For example, one participant was the front of house manager in a food-service retail location then sought out a volunteer role where she could serve as the face of the

organization, greeting and helping serve individuals as they entered a community space. Another participant in this group who was working in an accounting role at a large private corporation, sought out volunteering where she could work with the financial statements and reports in order to best serve the organization's goals. A third member of this group, after losing the ability to work in her clerical position due to health concerns, continued to work in clerical positions with a local not for profit organization as a means of maintaining community contact.

Most of the pushed retirees' discussion about transition focused on the surprise and difficulty of the situation. One explained that "[she] went from this way more than full time job to nothing overnight. I found it very difficult to transition, really difficult" (LM). Another discussed how retiring had not been her plan, "I didn't consider myself a person who was ready for retirement at the time [when I started thinking about it]. I didn't see myself retiring" (HA). Another discussed the trends that she is seeing in her peers where "almost 50% of people over the last little while that I've been looking at it, they are retiring for reasons they have no control over" (VM). The findings demonstrated that the meaning of the retirement transition space for these participants is much more about loss than it is about moving into a new phase of life.

None of the pushed retirees group directly identified the similarities between their post-retirement volunteer roles and the work they had done pre-retirement. Although, when this was identified to them by the researcher, they did acknowledge that there were some similarities. One participant in particular shared at the end of the interview that they "found that really interesting. I had never really thought about why I wanted to work at the desk, but it is like what I was doing before. I guess I missed the people" (HA). The participants who had been pushed into retirement for various reasons looked to continuity in the roles they took volunteering after retirement as a



way to inject the same types of meaning into their post-retirement lives which they had in their pre-retirement lives.

#### ***4.2.1.3 Personal challenge***

The idea of taking on a personal challenge through volunteering played an important role in how some participants engaged with their post-retirement volunteer work. Participants in the planned retirement group expressed that they specifically sought out roles which would challenge them in retirement, as a way to maintain their skills, to continue to grow personally, or to lessen fears of growing old too quickly because of mental atrophy brought on by lack of challenging activity. One older adult was direct in his approach, saying

For me it was a desire to kind of move away from some of that [work] stuff and into the development of some different skills ... I was quite deliberate about making choices for volunteer work that would move me into areas that were new and would involve a new kind of learning. (DK)

In another example, one participant chose the types of volunteer roles in which she is presently involved to “challenge [herself] because when you are older, you have to, to keep your brain alive. You know, just simply learning new things. It’s like brain gym” (ML). For these participants, the idea of personal challenge was essential to maintaining their cognitive capabilities, as well as a productive place in society; elements which are essential to their self-concept and worldview. For them, contribution and maintaining an intellectual standard seemed exceptionally important and for this reason factored significantly in what volunteering meant to them. They chose to volunteer in this case, by their desire to continue to grow as individuals, maintain their own mental capacity in the process, and continue to meet the benchmarks of how

they measure their own worthiness as people given the significant transition phase they are engaged with.

For both groups, when their engagement with role identity is examined, it fits with Grenier's (2012) work in life course perspective, and the emphasis on trajectories having significant influence over our activity decisions in transition. For those who had planned retirement, their course has a distinctive opportunity to divert from their previous path, and take a new path with different challenges and possibilities. For those without a retirement plan and very sudden departures from work, there is still an opportunity to divert into something different, however the individual is much less prepared for that diversion, and is subsequently more likely to continue down the path they were already travelling, thus the maintenance of existing role identity, but in a new work sphere.

#### **4.2.2 Confronting perspectives on aging, health, and dying**

Aging, health, and dying were important areas of meaning for some participants when they discussed their volunteer experiences. Beyond simply the anxieties surrounding growing older, their perspectives on how they were perceived as aging individuals, the role that aging would play on their well-being and abilities, and the uncertain timeline of death weighed heavily on them. Some of the older adults expressed concern about being understood as 'older adults' in the first place, saying things like "I'm already 62 but, hey, I'm not one of these older adults" or "I'm not old-old yet". One participant even expressed their feelings about whether they felt like an 'older adult' by referencing their father who they reported "delivered meals on wheels until he was 84, because you 'have to help out the old people'", the implication being that if he was helping the 'old people' at age 84, how could they be an older adult in their early 60s? By expressing these feelings about not wanting to be classified as "older", participants laid out

existing biases and negative meanings that being “old” holds for them. In this way, volunteering served to give a countered-meaning to the tacit understandings about growing older and the implications of that transition. One participant explained this idea when they stated “you can't just sit at home and watch television because you get really old really fast” (HA). Staying involved meant preventing the possibility of accelerated aging.

Building on the implication that staying active as a volunteer helped prevent aging, many participants also discussed how their involvement meant the possibility of decelerating the possible mental and physical declines of growing older. One participant shared that exact feeling, saying “That’s what keeps you – I think that’s what keeps you healthy so you can give more to others. You have to take care of yourself” (ML). Often participants were less explicit when expressing the value of physical and mental health in their decision-making, and what that meant to them. One participant shared “we're content that our health is pretty good and we can continue doing what we want to do and you know you'll never know what's going to happen five years down the road” (WE). Although not as direct, the implication is that while health is good, we should engage with these meaningful activities, or the opportunity might be lost. This became the crux of the discussion around physical health in particular, as participants showed a recognition that their physical health would decline. Therefore, if they wanted to do these activities from which they derived positive self-concept in retirement, they should do so before the inevitable time came when they were unable to do so. This undercurrent in the discussion about physical ability demonstrates an underlying anxiety about not only the frailty of physical health as we age, but also the understanding that contribution is tied to the physical ability of the body.

Not exclusive of physical ability, many participants identified the maintenance of mental health, cognition, and relationship health as important aspects of what volunteering meant for

them – “some of my oldest friends have gotten involved. . . which is really important. It’s really important to my mental health, and also, to the health of [my husband] and our marriage as we move into retirement” (RL). Under the theme of mental health, many participants identified that volunteering allowed them a means to manage stress, or helped them eliminate stress, which they felt they would not have otherwise as they retired. Much like the friendship and relationship statement above, one older adult shared that “part of retirement is finding that sweet spot for stress of kind of putting yourself out there enough where you feel some of the demands and you put demands on yourself freely chosen” (DK). Another expressed that “it’s amazing how my days feel full and nothing I do is high pressure. Maybe that’s the difference. You don’t have the mental stress” (BJ). For one participant, who had identified their previous working lives as very stressful, involvement in volunteer work allowed a significant change in how they saw themselves and their place in the world – “basically I’m more alive, in the sense that you’re not just getting numbed out by one job that demands everything ... I guess it keeps you fresh suddenly” (LM). For this participant in particular, their retirement and volunteering presented a world to them which was new, fresh, and exciting; elements which were missing prior to retirement.

Much like physical health, the explicit discussion around mental health carried an implicit anxiety about the implications of deteriorating cognition and ability with aging. Although the discussion about mental health was primarily focused on worldview and stress, the participants also alluded to how volunteering helped to support continued mental health. In fact, one participant shared a long story about how their experience with how mental illness can affect the ability to participate in volunteering:

[I] worked for an organization that has a service totally for seniors, for helping seniors, and I've worked in the bookstore with a really good friend of mine who was 10-12 older

than me and started to get a little bit of dementia and she loved coming to that store, just loved it and so I said, I know how much she loves coming here so I will volunteer to come in to work with her.

She couldn't and eventually it got worse and worse, I would come in and do her job for her before she got there. And then when she got there, all she had to do was file the books, put them all in the right price, she was pricing everything wrong. Most of the time we just sat there and talk because I had done her job but she loved it and she was a beautiful woman.

What they didn't know was that her husband used to be the CEO or the -- what do they call the CEO of that organization? Well, he was the chairman of EWCS one time.

*Interviewer: The executive director --*

Respondent: Executive director. That's right. He was the executive director and at one time, when they were really struggling, he kept it going. They were wealthy. They were both really wealthy and they kept it going. They kept it going. Your mother would know who I'm talking about.

Anyways, she came back in her later years to do this job that she really loves and loved the interaction with the people and people constantly were picking on her because she couldn't make change very well. She had never worked outside of the home but the customers loved her. They would always help her make the change and stuff and through the end I was helping her, I was doing the job for her, was sitting there.

One day, she got called in the office and they fired her. She walked out bawling her eyes out. This is an organization that has a senior's program and they have all these people treating to deal with seniors and they pull this little old lady and tell her, "You know, we don't need you here anymore because you're confused" or whatever and she comes back to me and tears running down her face, "They fired me. They let me go." And you know, those kind of things are heartbreaking.

As a volunteer, and how does a volunteer fight back? You can't. Like she did. She had a lot of her friends in town, who all knew that she got fired, they instantly withdrew all of their funding from EWCS. Huge loss of money because this little old lady who they shoved out the door instead of bringing in somebody that was really part of the team.

Anyway, maybe I digress but you're working in the -- you might as well know everything that goes on in volunteering.

For this participant, the story is political. It is shared as a means to demonstrate how the politics of age and ability affect volunteer labour, even though the subtext of the story is that of how the mental illness is stigmatised, and subsequently punished socially. It is shared under a broader thematic context of discussions about health, ability, and desire to contribute to the community while you still can. In essence, it becomes a story about the value of having and maintaining

mental health, and the personal, social, and political meaning of that mental health on how individuals feel about themselves and their place in the world.

Discussion on failing physical and mental health invariably leads to discussions on dying. When confronted with the concept of death one participant shared “there’s not a single soul on earth lying on their deathbed wishing that they’d spent more time at work. Not one. Right? No matter how engaging their work was and how important they thought they were when the push comes to shove” (JP). The context of this statement adds to its pointedness, as this participant was talking about how his volunteer roles fit into his retirement and retirement plans, and gives focus and meaning for some of his energy.

Aside from the statement shared above which is focused on the use of time and the need to fulfill personal needs before death, discussions of the repercussions of loss of health and death were kept almost exclusively to those individuals who had been pushed into retirement. In particular, three of those participants had been on medical leave close to, or as a precursor to their retirements. As aging adults, they had confronted illness and mortality leading up to their departures from work, and have incorporated this into their meaning about volunteering. One participant’s perspective is summed up by “is your health going to stay great or is it going to start deteriorating?” (WE), and another’s by “you never know how that factor is going to be in there. Health, when's that going to change?” (HE). The use of time while their health is still good, and the use of time by choice and not work, gives meaning to their volunteer work as a way of exercising their autonomy and sustained health as they grow older.

#### **4.2.3 The complexities of time use in retirement**

Discussions of time, and the use of time, were important component parts of how participants derived meaning from their volunteering. The use of time, or the perceived excess of

time, factor into the retirees' feelings about their work/retirement transition, and what it means to be retired in personal and social contexts. In a very personal way, perceptions about retirees having an excess of free time meant increased anxiety for older adult participants. "Sometimes that even felt a bit paralyzing" said one participant, "like, 'okay, another day where actually – let me check my calendar – no, there's nothing on there. Most people, and I myself, fantasized about that as being spectacular. Wake up with nothing on your schedule" (DK). But, for some participants this translated into a loss of purpose or sense of self. "Days are sort of stretching out with not a specific plan. We're taught when we're young to fill up your time. Don't waste a minute. So I still find it difficult when I don't have [a schedule]" (LM). Having a purpose is an important component of personal meaning-making and participants felt that volunteering added purpose to their time.

Participants who had planned their retirement discussed time and the influence on the meaning of retirement for them in a particular way. This was mostly contextualised around the new-found ability to manage time in a way that allowed more freedom. One participant explained:

When I was working I didn't spend sufficient enough time canoeing, kayaking, hiking, cycling; that stuff. Then I would get blue. Like come September I say 'shit, I burned up the whole summer. I didn't go out enough. Now that I'm retired there's not so much a problem. (JP)

In this context, the freedom of time in retirement allowed the retirees to better express their own desires and personal pursuits, creating a more complete image of their "self" through retirement volunteering.

For the group of pushed retirees, their discussions about time were less about fulfilling missing parts of themselves, but more about managing that time for health and personal benefit. One participant stated “I have a lot of downtime. I have discovered with my mental health, I almost start to hyperventilate if my days are too busy” (BJ), and another shared “I think going forward for me, it’s just a matter of I enjoy the volunteering that I’m doing and if something else comes up, I’d look at it and see if they could fit in, and I don’t want to overload myself” (WE). This type of time-use management as a way of maintaining the self for pushed retirees contrasts with the building of the more complete self which was expressed by the planned.

Participants also discussed the challenges of time in a social context, insofar as they were understood to be available all the time. Concerns surrounding the idea of perceived availability, or the fact that retirees are understood to be universally available for volunteering were prominent with participants, especially those in the planned retiree group. This idea was best exemplified by one member of that group who referred to retired older adults as ‘open prey’ for organizations seeking volunteers. Discussing one volunteer commitment he was involved in, a participant explained that “I wasn’t particularly interested, but it was some stuff that they needed doing” (DK). For him, this was about the feeling of pressure to agree when “you announce that you’ve retired in terms of people wanting to draw on your skills and capabilities or things you’ve done and they know that you can help in a particular way” (DK). For this group, their relationship with time also meant the fear of losing the flexibility and choice in retirement, in that “[most] volunteer work, it tends to tie you down” (RL). The concepts of being actively pursued by organizations, or leveraged to volunteer in retirement, change the relationship to the transition for those who encounter it. This creates a need for older adults to be able to exercise their autonomy when confronted with being asked to volunteer, and likely creates a layer of



anxiety which interacts with the meaning of and feelings about volunteering in transition to retirement.

#### **4.2.4 Facing fear/anxiety about transitioning to retirement**

Beyond the simple expressions of the ‘why’ participants volunteered, the older adults expressed concerns, fears, and anxieties when discussing retirement, volunteering, and their choices in this time of transition. Concerns, fears, and anxieties expressed by participants were broken down into significant sub-themes: overcoming loss of purpose; overcoming loss of personal connections; and the influence of finances.

##### ***4.2.4.1 Overcoming loss of purpose***

The move away from regular paid work is a significant transition for older adults, not least of all because of a change of major life focus. As most retirees no longer have dependents living at home, in retirement they face a significant change in life purpose away from regular working schedules. For some older adults, this significant change is another step in their life plan, and they can slide relatively easily into their new roles. For others, the change in life focus leaves them with a lack of purpose and a significant need to redefine who they are and re-establish self-concept. Some participants related the loss of work tasks and feelings of busyness to a loss of the self in daily life:

I found it a very difficult transition, really difficult. I’m used to being busy. I’m used to having lots to do. The whole feeling that you’re contributing something and you’re providing something of value, I think all of those things just sort of disappeared all at once. (LM)

This participant was not alone in this feeling, and was echoed by a participant expressing how the loss of schedule and the identity associated with keeping that schedule were the causes of significant stress:

That's a huge, huge thing and you don't have a schedule. You know you're always getting up. You're doing a certain thing, coming home at a certain time. You'll be preparing for the next day at work, all that stuff and now what do you do with that extra time? It's very frightening. It really is, and I think a lot of people – I don't know – who'd get depressed if you don't get involved in something. (CM)

Some participants expressed loss of purpose less directly. One participant stated that “there are times where it's not spectacular, that it's kind of like – it awakens this existential angst about who am I and what am I doing with this life, and this Tuesday, where do I go with this?” (DK), and followed later with “what do you do with this lifelong toolkit you've developed? ... All of a sudden, it felt like it's just sitting there and it's going to dry up and atrophy.” Another participant expressed these feelings a little more succinctly when they said “you just lose your angle like, ‘what is my purpose now?’” (ML). Volunteering is able to re-engage the sense of purpose felt by older adults by providing a focal point for their energy and self-concept. Where they may have lost their most significant locus of self-identity, having consistent volunteer involvement provides a new way of bringing context to their lives and activities. For some, it empowers them to re-define themselves and overcome perceived role loss in their lives. Volunteering gave some in this group a “reason to get up and do something” (EH) on the days they had volunteer commitments. It also met the need that many of the participants expressed to be able to contribute something, an element which was significant in the self-concept of the participants in this study.

#### ***4.2.4.2 Overcoming loss of personal connections***

The anxiety generated by and the need to overcome the anxiety of the loss of personal connections in retirement became significant as participants move through discussions of retirement transition. This anxiety was about dropping out of well-established social spaces and networks during retirement, and was a motivational driver for some participants to engage with volunteering. For them, volunteering meant a re-entry into social spaces that they felt they may lose as they transitioned out of work. For one participant “part of it is to interact with other people . . . and we live in [a rural area], so it’s a big thing” (WE). Another reflected on her conversations with her peers where they expressed anxiety about not knowing “how they’re going to replace that constant contact with people, so many people every day and I think some people get surprised by how quiet it can be when that piece is removed because they took it for granted” (VM). Another participant expressed the same types of feelings. “You have to network with people just because nowadays that’s so hard to network or get a job without networking and I think when you retire do you still have a network?” (WE). These feelings express, beyond the personal struggle of losing touch with people in a social circle, the possible loss of sense of self which is inherent in leaving a main social group.

For some participants, this simply meant meaningful interactions with other people. One participant stated, “I’d rather have live people to talk to than sit at home and talk to myself” (HE). For others, the volunteer space was a way to meet like-minded people, above and beyond simply meeting others and socializing – “this is a group that I can get up in front of, I can feel comfortable with, that if I do something wrong, they’re forgiving. And no, they don’t criticize” (DA). A different volunteer also discussed the influence that like-minded people had on his volunteer involvement, saying:

I enjoy them. I enjoy the people involved, the people that I have to work with. I enjoy working with them. They're nice people. If I didn't enjoy working with them, I would do something else. They're nice people to work with because they are there because they want to be there. They don't have to be there. They want to be there which is great about a volunteer organization as opposed to a workplace where you have to be. (CM)

Some respondents identified that were it not for the other people involved in their volunteering, they would not volunteer at all – “I like volunteers and that's one of the major reasons why I like volunteering, is that I like volunteers” (JP).

In these cases, involvement with volunteering is about creating concrete, positive interactions with others for the volunteer. These are both a means of maintaining social connections, but also a means of validating the need for social interactions in the volunteer themselves. By meeting like-minded people who share their commitment to volunteerism, and likely some of their social needs and personal circumstances, they are able to validate those needs in themselves, strengthening their own self-concept. This makes volunteering in the transition to retirement not only a maker of meaning in the lives of older adults, but also a validation of the self for those same people.

#### **4.2.5 The influence of finances**

Financial difficulties or stress featured for some of the participants, and the expression of this affected decision-making, as well as volunteer role selection for affected participants. “It's just a matter of what you spend your money on and how you spend it, whereas before you know you have that paycheck every week” (WE). Where the financial realities of being a retired senior really became clear was in discussions about healthcare. One participant who self-identified as a senior living in poverty, described it in this way

When I was working I would think that nothing when the dentist's office calls and says it's time to come in, you simply go. When you don't have any of those benefits, you have to tell them 'I'll save enough money' because a lot of times I went -- it was very expensive. Money does become a real issue. This [wheelchair] needs to be repaired again. And I'm supposed to only go to a place that deals with power chairs that tilt. But my brother has figured out how to fix some of the things. So I'm constantly calling him to come because this is flopping again and the arm went down and I don't know how to put it up again. But if I had to call service, this \$65 is just for them to come. And you know, if you're a senior and you have all the other things like dental and all of that to pay for, the only thing you really have covered for you is your drugs. (HE)

This participant was not the only one who made direct comments about the financial situation of seniors in retirement. another shared that “it's impossible to retire and live a good life, a decent life, on the amount of money that you get just kind of a government pension and that's all I have is the government pensions” (HA). These examples are indicative of the challenges some participants faced I retirement and their relationship with volunteering. For these participants, who are actively volunteering at this time, the need to balance their commitments and activities with what they can handle financially is important. Although the volunteering itself does not cost them anything, travel, organization, and the possibility of costs associated with meetings (i.e. if meeting take place at coffee shops or pubs and volunteers are expected to pay their own way), are important considerations when money is tight. If the burden of these is too great, then it is possible and likely that volunteer involvement could decline or stop for those in financial need.

Perhaps telling of the situational retirement divide in the sample for this study, those retirees who discussed the influence of finances were predominantly those in the pushed to

retirement group. Without a plan in place, and often without financial security or strong pensions, those older adults pushed into retirement have different, and arguably far greater financial concerns than those with established retirement plans.

#### **4.2.6 Making a difference in people's lives**

Participants identified that the presence of volunteering in their lives was about contribution and making a difference. These contributions were on two levels: an individual level where their volunteering reflected their desire to directly affect the lives of other individuals; and a community level where their focus and purpose was to better the community they lived in. Although these two settings seem quite similar, and the needs of the individual are part of the needs of the community, how participants expressed the meaning for them of helping individuals and working within the community were different.

##### ***4.2.6.1 Value derived from the feeling of making a difference***

On the individual level, participants reflected about what it meant to them to be able to make difference in people's lives. Although they often discussed the effect that this work had on others, their comments are also indicative of a direct value they felt for themselves in doing this work. That value contributed to self-concept, and for some was a significant factor in their decisions to volunteer as they transitioned to retirement. These feelings were expressed in many different ways by the participants, but most frequently they discussed examples of personal happiness or gratification from influencing the lives of others through their volunteer experience. These feelings played an important role in the way that participants engaged with their volunteer work. One participant said:

There's a real mixture of people who come to us for help . . . it just is fulfilling. It's such a positive experience and whether everyone must feel like that when they volunteer. I

don't know whether everyone gets the same sort of gratification from volunteer work, but it really is profound for me. (BJ)

Another participant gave their perspective, saying that “you just need to have affirmation that you are, or confirmation that you are of value and you're making a difference because otherwise, what's the point?” (ML). This comment in particular shows the significance of the taking of personal value in volunteering for the older adults in this study. By engaging in the act of volunteering it is clear that participants see value in this type of contribution, but it simultaneously creates a space where it is possible to wonder if the work is for the good of the community or for themselves. A discussion of intrinsic versus extrinsic rewards appears: they must believe in the work they are doing in order to continue doing it, but is the reward helping others or the feelings of affirmation?

For some participants this question is simple and clear. One older adult noted that she was motivated to volunteer because it “did make a positive note with somebody else's life . . . so that was my major rationale for the job” (BM). The idea of helping another individual was highly meaningful for them, as it was for other volunteers in the study – “if that meaning can be giving back, contributing to at least one person beyond yourself; that's why volunteerism works so well” (VM). For other participants, volunteering meant leaving positive impressions and influence on others through their volunteer work. One participant shared that:

In a weird sort of way it's somewhat narcissistic or whatever. I mean it's very important to me I guess, the impressions that I've left with people . . . The experience I'm saying is bumping into these people and realizing that I don't know if [my volunteering] changed their lives but at least that I've had a positive influence and that they still view me as positive so many years later is, that's a boost. I like that. (JP).

For others, the motivation was less extrinsic in nature and was more about knowing they were able to contribute in a setting where they felt really needed, and the positive feelings they derived from that work. By working in these spaces they were not only helping out, but were really developing a sense of value for their actions and use of time in retirement; fashioning or bolstering self-concept. One participant shared her experience as a volunteer driver:

You want to drive people who are dying, and sometimes, we will go to their appointment then we'll drive home back roads and look at the trees and look at whatever and we chit chat about the cows that are in that field over there. I have the best time . . . then I come home and I think I feel really good about me today. Maybe that's not the reason to do it but it is for me. (HA)

For HA, involvement in volunteer driving generates positive personal feelings, and a knowledge that offering skills she has (the ability to drive others), makes a difference to those she is driving. The way she engages with those feelings shows that this engagement is likely more about her than it is about them. Another participant shared similar feelings about their work as an English as a Second Language tutor, “even though I have never been a teacher, being a tutor to somebody who is really trying and really wants to learn is something that's really great. It's very satisfying” (WE). Being able to share her skills to help someone else when they are in need gives her personal satisfaction and gives that involvement meaning beyond simply spending the time.

#### ***4.2.6.2 Value in community***

The other side of making a difference for participants in this study was the value they found in community involvement and engagement. Different from making a difference at the individual level, or the boost of personal value taken from individual action, community involvement for participants focused primarily on the idea of being able to give back to the



community at large, and being able to support sectors of the community who might need particular support. The concept of community involvement was deeply entrenched in the understanding of volunteering for the older adult participants of this study. One participant described the stereotypical volunteer as “someone who does it out of the goodness of their heart because they want to give back to their community” (VM). Another said “it’s all about giving back. It’s all about doing for other people, for those less fortunate and then the interaction with them” (BJ). This is indicative of entrenched social meaning associated with volunteering and the role that volunteering plays in the lives of individuals and communities for these older adults. Having come of age in a different time in the world, and with war-time parents, the baby boomers see volunteering in a way which is arguably different from the way their children now engage with the concept. Thus, the community focus of volunteering as a whole has significant impact on what volunteering means to the lives and self-concepts of the individuals who participated in this study.

The participants were particularly focused on giving back to their neighbourhood landscape “I got involved with the neighbourhood association here ... it’s not onerous and it’s a nice walk” (DK), bettering their larger community environment – “Well I just want to give back to the community, also the community where I live and it’s the school where my children all went” (ML), and participating in community development projects like two participants who are involved as volunteers assisting with “bringing a Syrian family of refugees to live in Canada” (RL). This neighbourhood focus embodies a community understanding of volunteering for these older adults, and gives additional evidence to the idea that the personal value of community participation is engrained in their worldview and sense of self.

These community-focused feelings go beyond the neighbourhood and stretch to other sectors and spaces in the lives of the older adults in this study. Some participants also saw that their contributions to the community as a whole could be focused on community members they were unfamiliar or uncomfortable with. One participant shared:

I think it's all about giving back. It's all about doing for other people, for those less fortunate and then the interaction with them. . . I was uncomfortable around the type of people you see around [that community outreach centre], people that are probably living with addiction and that sometimes spend a fair amount of time on the streets . . . there's a real mixture of people who come to us for help. . . Now I know that I'm comfortable.

When I see these people I make eye contact and say hello. So it's really nice. (BJ)

Through their volunteer work and involvement, this participant has not only contributed to the development of their community as a whole, but obviously takes personal satisfaction in having been able to expand their own sphere of understanding. It is also indicative of a sub-theme within the community work of some participants which was focused on helping those who they perceived as being disadvantaged within that community.

### **4.3 Findings Summary**

The findings of this study illuminate the complex nature of the retirement experience, and the diversity of experience within the population of older adults who volunteer in community organizations. The participant group was divided by their mechanism of retirement, and shared experiences which both united and divided them based on this difference in their transition. Although each of them sought out autonomy, confronted perspectives on aging, health, and dying, and shared fears/anxieties about the possible losses they would have in retirement. Both groups also discussed the need to make a difference, although what that meant was different

between participants. There were also issues of meaning and motivation which differed between the groups. Planned retirees sought out personal challenge in retirement, and saw the roles they took on as retirees to be new opportunities for them which were unavailable during their working lives. Pushed retirees were the only ones to discuss the financial difficulties which are present in the lives of some older adults, and how these financial issues effect their volunteering. They also discussed different types of roles taken on as volunteers, roles which better matched their previous work.

In all, the findings of this study form a complex matrix which draws an interconnected picture of the meaning of volunteering for older adults. As expected, these meanings are diverse and change from participant to participant but help to demonstrate that there are many realities of volunteering in the transition to retirement.



## **5. Discussion**

This discussion will give context to the findings of this study as compared with the literature and in light of the larger research questions. Most of this chapter is dedicated to the discussion of meaning-making as described in the findings, and the personal, social, and cultural meanings which are inherent and sub-texts of these meanings. Although it is sub-divided into some of the same categories as the findings section, ideas in this chapter are interwoven throughout the chapter as the elements of meaning-making for older adults in this context are connected in such a way that it is impossible to fully separate one from the others. Following meaning-making, a discussion on the potential organizational issues presented in this research are explored. Finally, a brief discussion on the limitations of the design in the context of this study, and challenges with this particular study process are explored.

### **5.1 Demography**

The demographic distribution of the sample in this study cuts across a variety of roles in pre-retirement work, as well as post-retirement volunteering. Some participants occupied high level management positions in their organizations, while others had part-time positions across multiple employers while they were working. The sample also represents a minor cross-section of economic situations for retirees, although there were more individuals in this sample who would characterise their financial situation as stable than those who might characterise it as unstable.

The communities where these volunteers live and work are predominantly white, which is one of the likely factors in the racial homogeneity of the sample in this study. Although this racial distribution is not representative of the individual communities as a whole, it is unsurprising that the sample would be homogeneous in this way given the predominance of

white people in these communities, and the use of snowball sampling as one of the methods of participant recruitment as it tends to gather groups where individuals are similar to one-another (Biernacki & Waldorf, 1981). Over 60% of respondents were women. The fact that there were more women than men in the sample seems to align with Godbout, Filiatrault, and Plante's (2012) behavioural factors analysis which indicated that women are more likely to volunteer than men, as well as previous volunteer involvement research done on Canadian volunteers (Hall, Lasby, Ayer, & Gibbons, 2009).

## 5.2 Plan or no Plan?

One of the most intriguing findings in this study was the split in the participant sample along their circumstance of retirement; whether they were *planned* retirees where their volunteer roles were very different from their previous work, or *pushed* retirees where their volunteering looked very much like their previous work roles. This relationship between having and executing a retirement plan at the time of retirement transition and the uptake of volunteering is represented in Figure 5-1. What follows is an exploration of these relationships, how they relate to the literature and theory in the field, and the possible implications for retirees who move into regular volunteering when they retire.

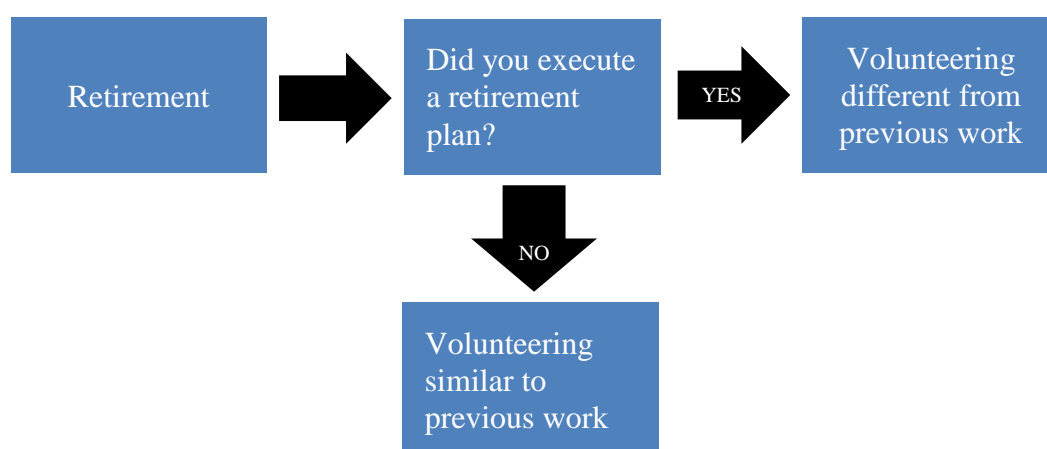


Figure 5-1: Choice prediction model for older adults moving into volunteer work during transition to retirement.

Pushed retirees did not have a great deal in common with one another, aside from being pushed into retirement without a functional plan. This group is made up of individuals who: were forced to end their working lives due to medical issues; individuals who were downsized or reorganized out of their work roles; and individuals who felt compelled to move out of the working world and into retirement because of fears/anxieties about losing the opportunity to pursue post-work life goals. What they do have in common is that they moved into retirement without a plan which they were able to implement when made to retire, and that when their trajectory led them to volunteering; they volunteered in roles that mirrored their working lives. This pathway to similar activities is congruent with both role theory (Biddle & Thomas, 1966; Sarbin & Allen, 1954), and continuity theory (Atchley, 1989; Chambré, 1984), which predict that individuals will seek out roles which are familiar to them as they move through transitions, and/or continue in existing roles where possible. Participants were looking to maintain their engagement with organizations or types of activities, and/or the type of work they had been doing, and did so through involvement with volunteer roles. This finding also supports the conclusions of Godbout, Filiatrault, and Plante (2012) from their meta-analysis of behavioural literature on volunteering, where they indicated a trend in this literature where older volunteers chose roles in which they already had expertise. The similarity between previous work roles and volunteer roles of pushed retirees is also borne out in other literature on older adults (see: Kaskie et al., 2008; Komp et al., 2012; J. D. Smith & Gay, 2005, among others).

These findings are contrasted by the other group in this volunteer sample of older adults who generally had a retirement plan and were deliberate in taking on volunteer roles which were very different from their working lives. These deliberate changes in role and commitment by older adults in transition to retirement are contrary to the volunteer behaviour literature, and also

fails to confirm the ideas of role and continuity theories. Given that the members of this group also share very little in common, other than having and executing a retirement plan, the applicability of these behavioural theories to the population of older adults may not fully explain their behaviour. The planned retirement group was more than half of the sample in this study, and each of them were deliberate in their choice of different roles and challenges. This sets planned retirees apart from other volunteers in the behavioural literature, and is an indication that this population is in need of further study. It could be that the participants in the planned group feel that they have leveraged their career-linked skill set fully, and a new challenge is required to keep them motivated to participate. Boredom with using those skills every day is also another possible motivation for seeking out new activity roles in retirement. Regardless of the individual motivations of participants in this study, the contrast between the experience and desires of participants and the expectations of retiree volunteer participation laid out in the literature is compelling. This evidence indicates that current literature does not represent this diverse group in a comprehensive way, and the basic trajectory model presented here is a basic step in establishing a more comprehensive understanding of the volunteer behaviour of recent retirees.

However, existing literature on Role and Continuity theories are not altogether un-useful when looking at the planned portion of the sample, since there is some research which reflects the inverse relationship of experience on decision making for volunteer role and activity selection. The works of Quick and Moen (1998), as well as Thoits (1992) both discuss how unhappiness in roles can influence decisions made to move away from those roles when confronted with a major life transition. Their assertion in this case is predicated on the experience in the previous role being negative, which then becomes the impetus for change of roles. Participants in this study did not necessarily indicate that their prior experience had been



negative per se, or that they had disliked their previous work roles. Instead, they noted that they were feeling tired and/or ready for more variety in their lives; feelings akin to, but not the same as job dissatisfaction as it is presented in the literature.

Participants in this group discussed their volunteer roles in a different way than their pushed counterparts as well. Where the pushed retirees talked about volunteer work giving them continued purpose and a way to get reconnected, many of the planned retirees discussed their commitments as new challenges, and ways to expand their community or social involvement beyond what they had already been doing. This is indicative of the personal meaning of their role (or lack thereof) in the decision-making process of retirement as a major life transition. As explored in the Life Course Perspective (Elder, 1985), these transitions and trajectories, along with having a significant influence over life outcomes, are important aspects of developing and maintaining personal agency (Grenier, 2012; Moen, 1996; J. C. Quick & Moen, 1996). Although we are not always in control of the circumstance, having influence over the outcome by our actions and making independent decisions is a major signifier of adulthood (Arnett, 1998; 2001). Where the decision about retirement is firmly in the grasp of the retiree, agency about when work ends and retirement begins is within their purview, and questions about being finished with the tasks at hand before moving through this transition are clear. Conversely, when the retiree is pushed into retirement, they are far less able to exercise agency over the process, and possibly lose some of the ‘self’ required to maintain personal agency and meaning; having been so influential in the minutia of their lives prior to retirement, only to have this important transition decision taken away from them must be significant.

A third possibility exists which is suggested by activity theory (Chambré, 1984; McNamara & Gonzales, 2011; Windsor et al., 2008), where involvement is spurred by the desire

to continue at a certain level of activity in the person's life. Where role and continuity theories seem plausible explanations for the involvement in similar roles for pushed retirees in volunteer work, activity theory is less applicable. There are no participants in this study, be they individuals pushed into retirement, or those who planned their retirements, who are engaged with volunteer work at the same hours/week level which they were working prior to retirement. Although many participants lamented the level of busyness they have as retirees, this really appeared to be contrasted with the perceptions of free time associated with older adults in retirement, and not with their working lives.

### **5.3 Meaning Derived From Choosing to Volunteer**

If meaning-making is a stand in for the complex interactions of personal needs and desires which measure self-worth, community concept, and personal identity, then the findings show that involvement in volunteer roles has an impact in these areas. What emerged from the data were complex relationships between the way people moved into retirement, the activities they chose for themselves during that retirement transition, how these transitions have played out in their lives, and the underlying social and personal expectations which influence personal decision-making and value judgements. For some, the time between retirement and our interview was short, just about one year, and others had been in transition for many more years.

#### **5.3.1 Agency and role identity**

Since we understand volunteering to be a choice, there is inherent agency in becoming and remaining a volunteer at any age. This is particularly true in retirement where the need to build a CV, or establish working relationships in order to secure employment are past; seniors in need of supplemental income in retirement notwithstanding. Therefore, the autonomy which is important to older adults in volunteering is not about the choice to volunteer or not, but about

control they have over themselves and their roles while volunteering. This need to be autonomous, even when working as a part of a larger organization, likely links back to the self-concept of older adults. As retirement carries an underlying social understanding of personal freedom, it is reasonable to infer that the need for autonomy in their roles as retirees is linked to social expectations and sense of self for older adults. These personal and social expectations help to establish the anticipated trajectory of retirement (Grenier, 2012), and deviation from that trajectory has the potential to be seen as failure to achieve the sought-after retirement standard. Having successfully navigated their way to a retirement position (planned or pushed), perceived failure in retirement by being tied into a role without autonomy also has the potential to challenge participants' identity as aging people (Rosenmayr, 1982). These feelings are not likely manifest for older adults in this way, as the reasons for wanting autonomy need not be so complex. The likely response to questions about why they want autonomy in the way they engage with volunteer work and other activities in retirement is likely "because I've earned it."

Perhaps a more complex question than retirees need for autonomy are their decisions about volunteer roles and the consequences to personal identity from those decisions. Inductive analysis of participant comments about volunteer roles and their exit from work, shows that participants who were pushed into retirement had "unfinished business" in their working lives. To manage these feelings, they were using volunteer roles similar to their working roles as a way to cushion the sudden loss of role identity. To paraphrase Grenier (2012), it is almost as if they had been derailed, and the uptake of similar-to-work volunteer roles was a way of putting themselves back on track, at least in part. Likely, this could also serve as a means of bringing about a planned and controlled end to that portion of their lives, and allow them to feel as though they have better control over the new trajectory of their life course. The fact that none of the

participants in this sub-group indicated that maintaining that working role was their reason for selecting that volunteer role indicates a sub-conscious motivation to do so. This was highlighted when one participant engaged the researcher in discussion after the interview was over. Saying that she “had never thought about it that way before” indicated that she had likely chosen her front desk role for exactly that reason, and that she found that relationship “very interesting”.

The experiences of pushed retirees aligns well with the expectations of behavioural choices laid out in both role and continuity theories. The retirees who were pushed into this space had no other plan, would certainly be suffering from what Moen, Dempster-McClain, and Williams Jr. (1992) as the loss of role identity. For pushed retirees, pursuing similar roles could also be a way to defray the perceived negative emotions about losing working roles which Thoits (1992, 1995) equates with depressive and anxious states. Chambré’s (1984) work on maintaining continuity through life transitions may also apply in this situation, as the pushed volunteers may see volunteering in similar roles as a way to bridge through this transition and maintain a level of continual involvement in a type of activity as a way to stabilize their lives.

If pushed retirees might have a more sub-conscious motivation for choosing certain volunteer roles, the planned retirees were much more overt about their decisions on volunteer roles. For them, it was about continued growth, personal challenge, and getting back to roles they had considered or began earlier in life. This much more overt and open motivation for choosing roles fits less well with the theories explored in this work, although it does resonate with some parts of both activity and continuity theories. Volunteering must, at least in part, be a way of occupying time for older adult volunteers, and a means of maintaining some level of activity scheduling and involvement in order to stave off the development of boredom or atrophy (Windsor et al., 2008). It must also provide some abstract type of continuity of action, especially

if older adults are picking up activities which they have left behind in the past (D. B. Smith, 2004). The divide between planned and pushed retirees adds a layer of complexity to the application of the psychological theories to the data in this study. Because those who planned their retirements show such a stark contrast between the roles they worked in and the ones they volunteer in, a wider theoretical net must be cast from these theories in order to help explain their behaviour.

#### **5.4 Aging, Health, Dying**

Participants grappled with aging and health throughout the interviews in this study, but only one participant overtly addressed issues of ageism and the perceived abilities of older adults in retirement in their interviews. This is a significant point, as many of the participants did express feelings about not wanting to be classified as ‘old’, and therefore balked at the idea of being classified as an ‘older adult’ for the purposes of this study. The reluctance demonstrated by participants about self-classifying as “old” highlights the critical perspective on age-based classification of participants in research highlighted by Bytheway (2005), among others. The participants in this study, although retired, are not ready to be old, and for many of them this is part of the impetus for volunteering in the first place. Their reluctance, although personal in nature insofar as they fear the negative physical and psychological effects of aging, must also be social as they are necessarily affected by ageism in some parts of their lives (Minichiello, Browne, & Kendig, 2000). This outward trepidation about being called ‘old’ allows the inference that participants are experiencing an internalized ageism, and are predicting their own declines in the not-to-distant but yet undetermined future. These internalized negatives associated with ageing in the volunteer space are reflected in the literature on older adult’s social role expectations (Minichiello et al., 2000), as well as the volunteering literature (Warburton,

Paynter, & Petriwskyj, 2007; Warburton, Terry, Rosenman, & Shapiro, 2001). Although many of them acknowledge the eventual decline in function which will come along with aging, they were clearly eager to keep those declines at bay, and were using their volunteer involvement as one way to do so.

The declines that participants discuss are physical and mental in nature, but each presents different consequences. On the physical side, many participants already acknowledge that they are less capable of completing the physically demanding tasks they experience in their lives. They have accepted these declines and at the same time see their volunteering as a way to help maintain their physical health as long as they can. For participants the link between volunteering and physical health stems from personal experience and beliefs, but evidence of this relationship is present in the academic literature as well (e.g. Kaskie et al., 2008; Komp et al., 2012; Shmotkin, Blumstein, & Modan, 2003). In the case of physical ability, slow loss of those abilities is seen as a consequence of growing older, a consequence which is inevitable but acceptable (Wister & McPherson, 2014). Because of this, many participants wanted to continue to participate at the level they were currently able to maintain, which was comfortable for them and provided some meaning to keeping this activity in their schedule. For them, the maintaining of activity level provided comfort, both in the face of the retirement transition (McNamara & Gonzales, 2011), but also in the transition to being an older adult and the physical declines inherent there.

Where the loss of physical ability is just ‘growing older’, the loss of mental faculties (other than the occasional “senior moment”) is ‘losing your mind’, and because of this they are treated differently in the social context (Wister & McPherson, 2014; Youdin, 2016). Seen as

somehow separate from the natural progression of aging, anxiety over the atrophy or loss of mental faculties was evident across the sample.

The loss of mental faculties is also more likely to affect the volunteer roles of older adults (George, 2011; Greenfield & Marks, 2004). None of the participants in this study, other than one participant working with a hiking trail club, were engaged with specifically physical forms of volunteering, and therefore their participation relies more significantly on their ability to be mentally present and engaged with the activity than their physical presence or abilities. In the context of their volunteer roles, and the importance these roles have in the lives of these regular volunteers, their mental capacity and engagement is their contribution, and the loss of that contribution coincides with a loss of how they see themselves and the personal meaning associated with those roles.

## **5.5 Fear/Anxiety**

Participants expressed both fears and anxieties about their volunteer involvement, volunteer roles, and effects of these on their daily lives. These fears/anxieties were divided into three overarching themes: overcoming loss of purpose; effects on social connections; and financial issues.

### **5.5.1 Overcoming loss of purpose**

Ideas of purpose in life, or the need to find purpose in volunteering for participants are tied to the circumstance of leaving work and the associated meanings linked to volunteering in retirement (Greenfield & Marks, 2004; Kaskie et al., 2008). At a primary level, for each group of participants their volunteer roles were linked to ensuring that they had purpose in their lives, be that completing unfinished business in a certain sector, or continued challenge as they aged. In this way, volunteering seems like an obvious choice to fill a purpose gap for participants as it

allows for freedom in choosing activity, and the potential for a great deal of responsibility and personal gratification (Morrow-Howell et al., 2003). On a secondary level, engagement with volunteer work as a retiree possibly fills a void created by leaving the workforce, a void which represents the value of self within the community (Chambré, 1984; Greenfield & Marks, 2004). Here, we see a straightforward application of role theory to the experiences of the older adults in this study, seeking to develop and maintain familiar role structures in the face of change. The anxiety about this transition factors not only into the thinking of the individual, but also into the choices that they make in volunteer and other retirement roles (Thoits, 1995). Different from the meaning-making measures of contributing directly to the community, this was less about personal feelings of contribution and more about meeting the social expectation of continued community involvement and contribution for the citizen (Wandersman & Florin, 2000). As a working adult, individuals are well placed to meet the benchmarks of good citizenship by paying taxes, political participation, and civic participation (Dalton, 2009), but have the potential to feel as though they are falling away from these commitments in retirement. This represents an underlying social pressure placed on the individual in transition to retirement to replace the social standing they have through working with another form of social involvement.

### **5.5.2 Social connections**

Participants frequently highlighted the importance of the social interactions that their volunteering allowed for them. Although not everyone said so, it was clear that the personal interactions with others were important for them to still feel connected to other people. Consistent interaction with others made them feel like they still had something to contribute on a personal level even though they were no longer employed, which had been their main social contribution and understanding of self prior to retirement. These findings mirror the work of



Lancee and Radl (2012), which explored directly the relationship between social connections and departure from a workplace for retirement. Our social and personal networks are tied to what we spend most of our lives doing; for many retirees that is their work space (Lancee & Radl, 2012). It would then stand to reason that the connections that can be leveraged by retirees for volunteer involvement would flow from those connections, and if those connections were to suddenly disappear that rebuilding a similar network would be a priority. Given the nature of being disconnected from social networks and connections as a retiree, whether this was by a planned exit or a pushed exit, it is logical that those seeking renewed social connection would look to volunteering (Einolf, 2009; Morrow-Howell et al., 2009).

For some of the participants who did not have live-in partners, it was very clear that their volunteering was a catalyst to much of their personal interactions with other humans, and some of them even stated that the alternative was likely sitting at home watching television on their own. As volunteering builds personal networks (McNamara & Gonzales, 2011), the need to seek them out through volunteer work seemed indicative of a lack of accessible, formalized networks available to them outside of volunteering. More than one participant explained that even if they wanted to go to the senior's centre, that it would be difficult for them to do so on a personal level (many of them did not feel old enough for that).

Conversely, if they have had time and the forethought to plan for the significant transition into retirement, then perhaps they can be better emotionally prepared for the changing landscape of social spaces. Even so, those who move into planned retirement still expressed some difficulty and existential angst about who they might be as retirees, and where they might make positive connections with others as they moved forward. For all involved, the volunteer role(s) they took

on helped them to contextualize and understand who they were as individuals, and where they fit into the social fabric of their personal landscapes.

Here again we see a manifestation of Thoits' (1992, 1995) role anxiety in the participants of this study. Without the established social networks of their workplaces, they face the potential of social role loss along with the loss of their working roles. Even if they did not have a significant position in the social structure, or a coordinating role in the social setting, they still played a part in this space, a part which they will now be without. It makes sense, then, that these individuals would be suffering from this type of anxiety in the face of this social change.

### **5.5.3 Financial issues**

One factor which was discussed by several of the pushed retirees, but none of those in the planned retirement group, was the complexity of financial hardship in retirement, and the role that this might play in the decision-making process around volunteering and other time-use decisions. Discussion of financial stress are not surprising when considering their departures from work. If, for example someone was planning to retire at 65 years of age, but is suddenly pushed into retirement at age 61, this would give 4 fewer years to save money and grow any investments meant for retirement. It may also mean that the retiree has to begin receiving payments from the Canada Pension Plan (CPP) earlier and at a lower rate, tapping into savings earlier with lower compounded returns, or even missing out on any additional pension returns/inclusions which may have come along with working to a later age before retirement. The financial factor is further complicated by those who may have been working in small or family businesses with little or no workplace retirement plans, or those who may have been engaged with precarious or part-time work when they were working; leaving them with

enhanced difficulties related to supporting themselves into and through retirement (Shillington, 2003).

To date, there is no substantive body of literature which addresses the financial implications of volunteering for older adults. Some volunteer literature using large data sets has indicated that those volunteers with more stable finances tend to volunteer more in retirement (e.g. Choi, 2003; McNamara & Gonzales, 2011). The literature which does reflect the financial situation of retirees directly tends to focus almost exclusively on retirement savings and strategies, to the exclusion volunteer commitments. The lack of literature on finances and volunteering for older adults is likely symptomatic of the way that retirees are sometimes considered a homogeneous group. In this work, although the participants were not recruited or sub-divided by socio-economic status, the more obvious split between pushed and planned retirees also helped to highlight differences in the volunteer experience which were indicative of financial differences between them.

Although this research did not gather educational demographic information from participants, it became clear over the interviews that those who are most affected by these financial difficulties in retirement are those with less education and/or fewer advanced skills. They are the ones in the sample who were left with precarious work (e.g. employed at a small family business in the food/service industry, part-time clerical work for several businesses, or illness as a younger adult which led to the inability to work full-time) and did not have access to employer-based retirement plans/programs. Although they did not say they were unhappy with their volunteering roles and decisions, they are each limited in their own way by area of engagement, or how much time they are able to commit to volunteering. Information about the financial influence over volunteer participation seems to fall in line with the work of Principi et.

al. (2015) on the availability of personal resources contributing to volunteer involvement, although there were individuals in this sample who had extensive volunteer commitments in spite of significant financial hardship.

What put the issue of financial stress affecting volunteer commitments into sharp relief was the story of HA, who was spending 5 half-days a week at a volunteer role she loved when she realised that she was unable to continue due to lack of money. She was unable to commit so much time to her volunteer role because she needed to find a way to offset some of her costs as a retired person on CPP. How she did that was to find a volunteer role where she was able to access a small amount of payment for the mileage she did driving community members to appointments. At its very core, this is a story of an older adult who has had to make decisions about volunteering in retirement which are not contingent solely on her interests or desires, but on the very basic need which she has to feed and clothe herself. This illustration of financial hardship highlights a significant issue which has not been explored in research on older adults' involvement in committed volunteer roles. With such a complex and diverse population group (discussions of sample diversity to the side for a moment), this is likely not as uncommon as we might believe, and is certainly something which requires additional research and exploration.

## **5.6 Making a Difference**

Much of the value which participants outwardly ascribed to volunteering came in the form of making a difference, either for themselves, individuals, or the community as a whole. This is a key and consistent theme throughout the literature on volunteering in general, as well as older adult volunteering (Lancee & Radl, 2012; Nimrod, 2007a; Nimrod & Shrira, 2016; Omoto, Snyder, & Martino, 2000; Tang et al., 2010; Van Willigen, 2000). On a personal level, participants felt satisfaction, happiness, and gratification through their volunteer involvement, all

of which are expressions of personal emotions which they characterized as coming from the act of helping others. However, given that the social pressures of being an older adult transitioning into retirement are significant, there is an additional, if not alternate, driver generating these feelings. As involved volunteers, these older adults are meeting the social requirements of giving of the 'free' time they have to the community at large, contributing to the public good through acts of selflessness. This expectation is not overt, but is inherent in how we see the best and healthiest retirees; those who win awards, get media coverage, and are held up as social examples. It is possible that the positive emotions being felt by these participating volunteers are generated, at least in part, by their internalized understanding that this is the right course of action for those transitioning into retirement. In fact, there were some participants who characterized their own volunteer commitments in contrast to the lack of volunteer work undertaken by spouses or friends who were similarly transitioning into the retirement space. Kim and Feldman (2000), in their work on bridge work through the transition to retirement, discussed the effect of spousal employment status on volunteering in retirees. They showed direct effects on volunteering based on partner involvement, and this finding was supported by the work of Hamm-Kerwin, Misener, and Doherty (2009). Each of the participants in this study contextualized their spousal comparison differently, and although none of them characterized the lack of volunteer involvement as a negative, it was clear that they were covertly setting themselves apart from non-volunteers by doing so.

Although the internalization of this attitude has possible effects outside of individual satisfaction, and has the potential of negative social consequences for those who cannot volunteer either through physical inability, or the need to work in order to support themselves in retirement. This second possibility then generates questions about the role that socio-economic

status plays in the older adult social and volunteer communities. If there are consequences for not volunteering in retirement through sub-conscious social expectations, then those who are already financially disadvantaged are likely to be further burdened with social stigmatization. Although living with financial insecurity does not preclude older adults from volunteering (one participant in this study identifies as a disabled senior living in poverty), it does limit the types of involvement they can engage with, and certainly precludes the financial contributions which are often associated with volunteerism in community organizations.

### **5.7 Discussion Summary**

Exploring the complex array of participant experience in this study provides several angles of inquiry on the volunteering of older adults in community organizations. Although there is nothing particular about the demographic breakdown in this study, this would certainly change in this research were conducted in an area of Canada with a more diverse ethnic make-up. Examining the findings, the division between planned and pushed retirees became significant in the analysis as it not only informed some of the differences seen in the actual data, but also effected the application of established psychological theory to the actions of the participants. The mechanism of retirement is heavily implicated in the retirement volunteering experience, and in decisions about which volunteer options to pursue.

The influence of mechanism of retirement is layered with personal and social influences of the role occupied by retirees and volunteers, and the associated fears and anxieties which come from growing older. In a similar way, confronting the realities of aging, health, and dying are also present in the decision-making and meaning-making processes of older adults as they look to volunteering during their retirement transition. Lastly, for many participants, the volunteer roles and the personal meanings which they derive from participating in them rely heavily on the

personal beliefs and social implications of feeling as though they are making a difference, beliefs which are strongly self-centered in nature, although they extend beyond the individual and into other and the community.

### **5.8 Implications for Practice**

Participants were not asked to discuss the organizational practices of the organizations they volunteered for, but information about what worked and what did not for them as they explored the meaning of volunteering in their lives inevitably came forward. Some participants made direct comments about their organizations, both about positive experiences, and about difficulties they had with organizational politics or working with individuals within the organization. Feedback in this area and the subsequent implications for organizational practice split into three significant areas: The desire to be absent from the internal politics of the organizations they are involved with; the need for choice in their volunteer roles; and sensitivity to their time use and need for autonomy as retirees.

There was a general undertone within the participant group of being uninterested in dealing with internal political issues within organizations, which is aligned with the research already done on older adults in volunteer roles (Ramsey et al., 2016; Tang et al., 2010). In fact, two participants explained in their interviews that they had left volunteer roles because of the politics involved in the organizations. Working under the assumption that all organizations with multiple employees have some sort of political/structural conflict, participants will have encountered this type of issue in their working lives. Couple their career experience with the choice inherent in volunteering, and it seems intuitive that they would choose to stay away from the organizational turmoil. This may also speak to the desire to have the act of volunteering be what defines them as retirees, and not the specific role they take on or their organizational

leadership (Hustinx, 2010). For older adults involved in volunteer roles, organizations should be careful about how they are engaged at the organizational level. Reluctance, or lack of desire to be involved politically within organizations does not necessarily mean that these older adults do not have an opinion or input on the operation of the organization, and steps should be taken to outline the desired and accepted involvement in organizational decision-making which volunteers can engage in. This manner of opt-in leadership possibility allows older adults, even those who have been involved with organizations for a longer period of time, to modulate their involvement to suit their needs.

Other comments about organizations made by participants revolved around choice and use of time, which brings in other more subtle elements of organizational practice. Many participants discussed the need for flexibility, choice, and control in their lives, particularly as it related to any volunteering they might do. When discussing the need for autonomy or some level of control in their work, participants were seeking defined roles with clear expectations, and roles/expectations over which they could exert influence as a volunteer as they developed. One participant explained that “our generation of retirees don’t want just any sort of volunteer work. They want to have control. They want projects and they want it to be over within a said period of time and they want it to say what hours they want” (VM).

This echoes the literature on the needs and expectations of baby boomers as they age (e.g. Einolf, 2009; Kim & Feldman, 2000), and presents some interesting problems for organizations as they look forward to having an increasing pool of potential baby boomer volunteers (Einolf, 2009). For occasional volunteers, or those who do not work as core organizers, flexibility of scheduling is a priority. That may be linked to travel or other commitments whereby the volunteer can book themselves out for a week or a month. It may also be so that they can



coordinate with their other commitments including informal volunteering with family/friends, or other work they may need to do to stay alive, housed, and clothed (Shillington, 2003). At least one participant found this freedom through a technology-based scheduling system with his volunteer organization. He “looked at that and they had this nice little computing thing called [scheduling software] ... you just look at their calendar and you look at your own calendar. You say ‘no, I’m going to be away for two weeks and so you just don’t sign up for those weeks” (JP). The pool-based, multi-user platform allowed the communal management of the schedule with minimal monitoring from organizational managers, freeing up time and energy for other tasks. For many of the participants, having the flexibility in their lives to be able to drop any commitments they had at home and travel, visit, or explore new opportunities was of great importance, and encouraged ongoing involvement in that organization where other volunteer opportunities had been let go. With this need for flexibility in mind, a demand for consistent and regular volunteering by older adult volunteers may drive those volunteers away from organizations. If, by contrast, organizations are able to bring in more flexible schedules for volunteers, where they can still feel committed and contributory to the organization, but not locked into an unchanging schedule, they are more likely to remain with that organization.

Although some level of control is certainly present when older adults chose when and where to volunteer (to volunteer is inherently a choice), they are certainly vulnerable to being “hoodwinked” (DK) into using their time in ways they had not planned in order to meet the needs of the organization. When discussing the role he filled with one organization, one participant shared that “one of the things that happened there, because I did the research, I ended up not doing the stuff that I really wanted to do ... Yeah, I was going to say railroaded, but redirected” (DK). This shows a loss of control, and this participant’s affect when discussing this

volunteering they had done was less than enthusiastic. If personal autonomy is a significant motivational driver for older adult volunteers, then it is likely that this is a significant factor in the experiences that older adults have with organizations. When they find that they have a good level of autonomy and control over the nature of their volunteering, they are more likely to remain involved with that organization and in that role.

These occasional volunteers also seem to be looking for roles that are done when they finish their shift, a need which when not met is a reason to leave volunteer roles (Hustinx, 2010). They do not seem interested in bringing their volunteer work home with them for the most part, and would like to “hang up the keys and go home” as one participant described his end of day. This desire to have their volunteer roles be bounded by their desired level of commitment extends even to those who work in organizational capacities. Participants in these roles expressed a desire to better their programs, but also be free of responsibilities when they are not directly engaged with their work.

It is clear that older adult volunteers require a different approach to volunteer recruitment and retention from organizations than other volunteers. Where younger volunteers may need a rigid schedule in order to maintain their commitments, older adult volunteers are generally not looking to be locked into their roles and schedules over long periods of time. Coupled with a need to feel agency over their own roles, but lacking any desire to be involved politically within the organization, older adults have complex group needs as volunteers. It is, however, in the best interest of organizations to work on accommodating these individuals as the Canadian population ages and the number of healthy older adult potential volunteers grows

## 6. Conclusions

The following chapter will draw on the discussion from the previous chapter to make some final conclusions about the research presented here. It will also include limitations of the study and study design, as well as suggested future directions for research in this area of study.

The research presented here took a qualitative, grounded theory approach to exploring the experiences of older adult volunteers as they transitioned to retirement, and how that transition affected their volunteer commitments. For just under half of the participants in this study, their volunteer experience in transition to retirement mirrored what the extant literature in the field shows is the typical experience for retirees as volunteers. They pursued volunteer roles which match their work roles, and maintained community and social involvement through an extension of their working lives and skills through volunteering. For the other half of the study sample, their volunteer experience differed significantly from the expected role continuity described in much of the writing on this topic, and these older adults sought out volunteer roles which were purposefully different from their career working roles.

It is the mechanism by which the sample is split which makes this division important; the way participants ended their career working lives and entered into retirement. The group which closely matches the literature and sought out similar roles to their working lives were also those who were *pushed* away from their work and into retirement. They had little or no retirement plans, and saw volunteering as a stop gap or useful means of maintaining personal and social contacts. The other group were those with *planned* retirements. With orderly and pre-planned cessation of work and movement into volunteer work, the retirees with a plan chose volunteer roles which were different from their working roles, and did so deliberately to seek out change in

their lives, new challenges to help maintain mental acuity, or because retirement was their opportunity to re-visit previous interests.

The simplest implications of having these distinct groups within the retirement population are that the mechanism of leaving work has a profound effect on the kind of volunteer work that an older adult may be interested in when moving into a volunteer role, and that beyond personal hobbies/interests, there may be significant benefit for organizations in getting information about manner of retirement (pushed or planned), and the intention of their volunteers. A more complex implication of this divide is that thinking about retirement, beyond the financial aspects which are so ubiquitous in our understanding of this transition, must include thoughts and projections about the potential activities that an individual will engage with during that transition. At the very least, older adults and those who recruit them as volunteers must have an understanding of the “unfinished business” aspect of volunteer participation for pushed retirees, and be sensitive to the fact that likely the motivation for taking on these similar-to-work roles is more deep seated than just wanting to help out an organization.

The division between pushed and planned retirees also has profound effects on the meaning ascribed to volunteer work by older adults, and the role that volunteering plays in the understanding of self for these retiree volunteers. For those who were pushed into retirement, volunteering means an extension to the working roles they pursued, and a way to manufacture an end-point for which is under their control. It is means of reclaiming some autonomy over working roles and decisions, and to soften the transition stress which is inherent in a forced transition with little or no planning. Volunteering in transition to retirement means maintaining the type of social and network relationships which they may have lost while being pushed out of

their career spaces, and a way to retain a feeling of connection to the larger community and social spaces of their lives.

For planned retirees, the transition to retirement means new opportunities, new challenges, and new paths. Where pushed retirees seek out roles which match their previous work, planned retirees seek out roles which provide them with learning and engagement opportunities which they felt unable to access when they were working. For planned retirees, retirement and their ability to volunteer meant freedom of choice and decision-making about time use and the roles that they would undertake; the freedom being even more important than the roles themselves. Being able to volunteer freely in retirement also meant that their retirement planning and implementation was successful, and that they had met their goals and benchmarks to be able to make this transition smoothly and on their own terms.

There are lessons for organizations in the complexity of this study and this sample. The first is that older adult volunteers as they transition into retirement must not be treated as a homogeneous group which will flood into programs and opportunities with generalized recruitment and expectations. This segment of the population is dynamic and diverse, even within ethnically homogeneous spaces, and recruitment efforts must reflect a respect for that diversity. Second is the fact that there are distinct differences in the way older adults transitioning to retirement engage with volunteer work based on the circumstances of their departure from career work. Understanding that these differences exist and using them to inform recruitment and screening of older adult volunteers is likely to create better matches between volunteers and organizations, but also increase volunteer satisfaction and retention over time. Last, volunteer motivations in older adult volunteers in transition to retirement is tied directly to the meaning that volunteering holds in their minds, and that understanding how these volunteers

ascribe meaning to their work in volunteering, coupled with the previous two recommendations, will help organizations better understand their volunteer pools and provide them with the experiences they require to keep returning to volunteer spaces.

As we move into a time in Canada of unprecedented population age, the landscape of volunteering and available volunteer labour is focused on older Canadians. Organizations and movements which rely on volunteers to operate must establish ways to engage and maintain these older volunteers or risk major volunteer labour shortages. Research like this, which explores specific and personal accounts of volunteering in transition to retirement, is an important part of understanding this complex engagement puzzle. Older adults will continue to volunteer as they move into retirement, and continued research with these individuals is important if we are going to build age-friendly social structures, and encourage diverse and substantial social contributions from this sector of the Canadian population.

## **6.1 Limitations**

This project has explored the complex interactions and interconnections between retirement and volunteer roles, and the meanings these play for older adults. The study has a number of limitations. A sample size of 15 is small given the size of the population of older adults who volunteer. Rather than trying to examine issues for all people transitioning to retirement, the goal of the study was to explore this transition in depth with a few individuals. In addition to the difficulty of sample size, there is a lack of population diversity represented in this sample. All of the participants in this study were white. One participant identified as part of an eastern European community, but this level of racial homogeneity was expected given the largely white ethnic make-ups of the older adult populations in the southern Ontario communities used for this study, and the exclusion of religious institutions of any kind from the volunteer focus

here. If possible, using a more directed sampling method could yield a study sample or sub-sample which might better reflect the racial diversity within communities in the sample area. The sampling method may also have contributed to the lack of cultural diversity in the sample, as the personal and volunteer networks of participants were tapped for snowball sampling of older adults.

One of the main tenets of constructivist grounded theory is reaching theoretical saturation when collecting data. This point of saturation is difficult to establish under ideal conditions, but with a possible sample as large and diverse as older adults volunteers who are moving into retirement, this seemed unlikely. Although the patterns explored in this work emerged early in the research, and were supported as the research continued, there remain questions about if this pattern would be maintained across a larger sample of similar older adults, or if it would be maintained when a more diverse sample from this population was used.

## **6.2 Future Directions for Research in this Area**

Although this study explored the relationship between retirement and volunteering, it has opened a variety of questions for further study in this area. First of all, a deeper exploration of the relationship between mechanism for leaving work and the type of volunteering older adults take on in retirement is necessary to see if the pattern established in this work exists across a larger population sample. As explored here, if this phenomenon holds true at the population level, there are significant implications for volunteer recruitment and role assignment which will also require additional research in order to develop good practices to work with this information.

The second element for future research is linked directly to the first, and that is deeper exploration of the role of retirement planning on engagement with leisure activities after retirement. As shown here, having a retirement plan which is executed when leaving career work

has an effect on the volunteer choices of retiring adults, but a more directed study on the leisure planning choices of individuals moving into retirement and how that planning affects their levels, and types of engagement is warranted.

Third, some participants began to explore the role of retirement finances, and in particular financial difficulties, play on their decisions and abilities to volunteer in retirement. Although not the focus of this project, information gathered and presented here does suggest that additional work needs to be done on the role of financial hardship in the lives of older adults in retirement, and in particular on the volunteer and leisure choices that these older adults are able to make in their lives.



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## Appendices

### Appendix A



Date

Dear NPO director/manager

I am writing to request your assistance in recruiting participants for my Master's thesis in the Department of Recreation and Leisure Studies at the University of Waterloo. The main purpose of this study is to explore the experiences of volunteers in community non-profit organizations as they transition(ed) to retirement.

In community non-profit organizations, where much of the management and administrative work is done by volunteers, organizations have a great deal to gain from the involvement of these experienced and knowledgeable individuals. Although some information is available about the experiences of older adult volunteers in a general context, very little research has been done to understand their experiences as they have transitioned to retirement, and the roles that volunteering has played in these transitions. This information is important in helping community non-profits attract and retain volunteers, while making volunteer experiences more meaningful for those involved.

I would like to include volunteers from your organization in this study and I am requesting that you forward along the attached information letter to volunteers in your organization who are over 55 years of age. I believe that their active involvement with community non-profits like yours makes them ideal candidates to provide me with a unique perspective on this topic.

This study involves one-on-one interviews with the principal investigator (myself). These will take approx. 60 minutes and take place at a time and location that is convenient to each participant. If you are willing to forward along the attached information letter to your volunteers, please do so. Should you have any questions about the nature of the study, or the research process, please contact me (Luc Cousineau at [l2cousin@uwaterloo.ca](mailto:l2cousin@uwaterloo.ca) or 519-993-4066).

Participation in this study is voluntary. I would like to assure you that the names of participants and details of your organization will not be included in any reports or distribution of the research findings. Information and/or details about participants will not be shared with their organization for privacy and confidentiality reasons. There are no known or anticipated risks to your organization should your volunteers participate in this study. This project has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee.

We look forward to your assistance with this important research and thank you in advance for your assistance in this project.

**Principal Investigator:**  
Luc Cousineau, HBOR  
MA Candidate, Recreation and Leisure Studies  
University of Waterloo  
[l2cousin@uwaterloo.ca](mailto:l2cousin@uwaterloo.ca), 519-993-4066

**Research Supervisor:**  
Katie Misener, PhD  
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519-888-4567 x37098



## Appendix B



Date

Dear Volunteer,

You are invited to consider participating in a study conducted by Luc Cousineau, a graduate student in the Department of Recreation and Leisure Studies at the University of Waterloo. This letter has been sent to you on behalf of the research team, and contains information about the nature of the study, requested commitment as a participant, and your rights as a potential participant.

The main purpose of this study is to explore the experiences of volunteers in community non-profit organizations as they transitioned to retirement. Older adults make up a significant proportion of the population and those who volunteer are highly committed, devoting an average of over 220 hours per year to their volunteer duties. In community non-profit organizations, where much of the management and administrative work is done by volunteers, organizations have a great deal to gain from the involvement of these experienced and knowledgeable individuals.

Although some information is available about the experiences of older adult volunteers in a general context, very little research has been done to understand their experiences as they have transitioned to retirement, and the roles that volunteering has played in these transitions. This information is important in helping community non-profits attract and retain volunteers, while making volunteer experiences more meaningful for those involved.

We would like to include you in this study of older adult volunteer experiences. You are eligible to participate in the study if you are 55 years of age or older, hold an ongoing volunteer role, and are in the process of retiring or have recently retired (within the last 5 years). We believe that because you are actively involved as a volunteer in community non-profit(s), you may have unique perspectives to share.

This study involves one-on-one interviews with the student investigator. These will take approx. 60 minutes and take place on a day and time that is convenient to each participant.

Participation in this study is voluntary. You may decline to answer any portion of the interview if you so wish. Further, you may decide to withdraw from this study at any time without any negative consequences by advising the researcher. With your permission, the interview will be audio recorded to facilitate collection of information, and later transcribed for analysis. Shortly after the interview has been



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completed, we will send you a copy of the transcript to give you an opportunity to confirm the accuracy of our conversation and to add or clarify any points that you wish. At the conclusion of the study, a summary report outlining key findings will be sent to all participants. All information you provide is considered completely confidential. Your city, name and your organization's name will not appear in any report resulting from this study; however, with your permission anonymous quotations may be used. The status of your participation will not be shared with your organization. Data collected during this study will be retained for seven years in my locked office. Only researchers associated with this project will have access. There are no known or anticipated risks to you as a participant in this study.

If you are interested in participating in this study, please reply to this email or contact Luc Cousineau at [l2cousin@uwaterloo.ca](mailto:l2cousin@uwaterloo.ca) or 519-993-4066. I would be pleased to answer any questions you might have and can provide you with additional information to assist you in reaching a decision about participation. We would like to assure you that this project has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee. However, the final decision about participation is yours. Participants who have concerns or questions about their involvement in the project may contact the Chief Ethics Officer, Office of Research Ethics at 519-888-4567, Ext.36005 or [Maureen.nummelin@uwaterloo.ca](mailto:Maureen.nummelin@uwaterloo.ca).

We hope that the results of the study will be of benefit to those organizations directly involved in the study, as well as to the broader community non-profit sector. We very much look forward to speaking with you and thank you in advance for your assistance in this project.

Yours Sincerely,

**Principal Investigator:**  
Luc Cousineau, HBOR  
MA Candidate  
Research Assistant  
Recreation and Leisure Studies  
University of Waterloo  
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## Appendix C

### Interview Guide

#### **Introduction:**

My name is Luc Cousineau and I am a master's candidate in Recreation and Leisure Studies at University of Waterloo. My current research is about volunteering during the transition to retirement, and this research uses grounded theory. Grounded theory is a research method specifically designed to bring data away from any particular person, place, or time, in order to develop a theory about what is going on in the research area. I will not be using your name, nor sharing any data that might reveal personally sensitive information. All interview data will be coded in a way that it cannot be connected to you. Should you feel uneasy or unsure in any way during our conversation, or should you decide that you no longer wish to participate in this research, you are free to end participation in the research and all notes will be destroyed.

This interview is meant to be a conversation that will allow you to share your experience with me. Do you have any questions for me?

I am particularly interested in your experiences around volunteering during your transition to retirement. So...

**[Open Question 1:] “Tell me about your volunteering as you moved into retirement”.**

#### **Probes:**

##### **Retirement**

- Meaning for them
- Gradual vs. cold turkey
- New work?
- ‘free’ time
- Adventure
- New hobbies/past-times

##### **Volunteering**

- Previous volunteering
- New positions
- New organization
- Slowed down/sped up
- More hours/less hours
- Maintained their status quo
- Got partner involved
- Social networks/the people

**[Open Question 2:] “How did your move to retirement directly affect your volunteer commitments?”**

#### **Probes:**

##### **Roles**

- Took on new roles
- Maintained roles I had in the past
- Replaced roles that I had in my working life
- Doing fewer roles, but these are more 'important'

### **Continuity**

- Feel like I'm maintaining involvement
- This is my new 'work life'
- Keep doing the things I am good at
- Why slow down?

### **Activity**

- Boredom / I just got so bored
- I can't stand just sitting around
- Staying active is important

### **Trajectory**

- I was led into it
- Flowed from my working life
- Seemed like the next/right/reasonable thing to do
- Knew I could spend more time with my spouse

## Appendix D



By signing this consent form, you are not waiving your legal rights or releasing the investigator(s) or involved institution(s) from their legal and professional responsibilities.

I have read the information presented in the information letter about a study being conducted by Luc Cousineau, supervised by Dr. Katie Misener of the Department of Recreation and Leisure Studies at the University of Waterloo. I have had the opportunity to ask any questions related to this study, to receive satisfactory answers to my questions, and any additional details I wanted.

I am aware that I have the option of allowing my interview to be audio recorded to ensure an accurate recording of my responses.

I am also aware that excerpts from the interview may be included in the thesis and/or publications to come from this research, with the understanding that the quotations will be anonymous.

I was informed that I may withdraw my consent at any time without penalty by advising the researcher.

This project has been reviewed by, and received ethics clearance through a University of Waterloo Research Ethics Committee. I was informed that if I have any comments or concerns resulting from my participation in this study, I may contact the Director, Office of Research Ethics at 519-888-4567 ext. 36005.

With full knowledge of all foregoing, I agree, of my own free will, to participate in this session and to keep in confidence information that could identify specific participants and/or the information they provided.  
 YES  NO

I agree to have my interview audio recorded.  
 YES  NO

I agree to the use of anonymous quotations in any thesis or publication that comes of this research.  
 YES  NO

Participant Name: \_\_\_\_\_ (Please print)

Participant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Witness Name: \_\_\_\_\_ (Please print)

Witness Signature: \_\_\_\_\_ Date: \_\_\_\_\_





## Appendix E

May 25, 2016

### Memo – in-course Analysis

Moving through my interviews there have been some emerging themes from the work that I have done so far. For the most part the participants have been discussing the motivation for volunteering as we discuss the transition. I have found it hard to make sure that the discussion stays focused on the transition to retirement and does not become a discussion about the motivations to volunteer and that is all. If that were the case, I am not doing anything new.

I have been able to read into and understand the idea that these motivations do often reflect the transition to retirement, insofar as they are representative of the ideas and spaces that these individuals wanted to explore as they move into this phase of their lives. That said, I need to continue working on making sure that the discussion focusses on the transition before the overall motivation.

Two groups are starting to emerge in my data, in the way that people engage with volunteering in retirement.

- The first group are those who retired by their own choice, and with desires about how that phase of life would go for them. Mostly, these individuals have changed their volunteering and/or roles as they have retired. Some of them have changed their volunteering all together in order to better reflect their lifestyle change, and often this new work looks nothing like their old work, or their pre-retirement work.
- The second group are those that retired unexpectedly, or quickly due to health reasons or other factors. These folks seem to have volunteer roles which more closely mirror the things they were doing in their work lives, prior to retirement. If they were the face of the organization while working, they are finding retirement volunteer roles in which they can also be the face of the organization. Their volunteering does not contrast as much with their pre-retirement work

I need more data to make sense of this idea, and to see if it continues throughout my sample, but this is the first real sign of difference in groups in this research, and it is directly affected by retirement, and the type of retirement that these individuals are subject to.