Redirection:
Using Career Development Theory to Interpret the Volunteer Activities of Retirees

by

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Abstract

The purpose of this study was to examine formal volunteering among retirees in order to explore whether their volunteer experiences represent an extension of their career in the paid workforce or whether their volunteer activities represent a completely new direction, and how this influences their career self-concept, as interpreted through Donald Super’s life-span, life-space theory of career development. This study employed a developmental mixed-method design. In Phase 1, qualitative interviews were conducted with 12 participants to better understand retirees’ volunteer experiences. Phase 1 informed the design of an instrument for the Phase 2 survey which examined the issues among a larger sample of 214 retirees. The Phase 2 results supported the Phase 1 findings and indicated that many retirees sought an extension of career in volunteer activities in that they used similar skills and knowledge. Study participants also displayed a desire for lifelong learning.

Retirees relinquished their paid-work career, took on the retiree and volunteer roles, and integrated these roles within their career self-concept to create a new sense of self. These results
indicated that the retirees had entered a new stage of life, qualitatively different from ‘retirement’. To better reflect the experiences of these retirees, it was proposed that Donald Super’s life-span, life-space theory of career development be extended to include Redirection. This theorizing is consistent with the finding that retirees both wanted to and are able to integrate previous paid work elements as well as seek out lifelong learning opportunities within their volunteer activities. This study demonstrates that the volunteer role in the lives of retirees can lead to personal renewal and reshaping of the career self-concept, or what is labeled as the stage of Redirection. This study also has implications for volunteer management, retirement planning and social policy, and may be of interest to volunteer managers, nonprofit organizations, career counsellors, financial planners, retirement planning consultants, life coaches and policy planners.
Dedicated to my family,
especially to the youngest (Ryan, Shaelynn and Magdalene),
and oldest (Grandpa Jim) members.
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Chapter 1: Older Adults’ Career Development through Volunteering

Introduction

The purpose of this mixed methods study is to explore retirees’ volunteer experiences in order to understand whether volunteering during retirement represents an extension of one’s career in the paid workforce, or whether it represents something new, such as the development of new interests through the pursuit of lifelong learning. This study is interdisciplinary and integrates research and theory on volunteerism, adult career development (Super, Savickas & Super, 1996), and lifelong learning to provide a new perspective in the field. This study not only seeks to understand volunteering among adults who have retired from their paid jobs but also to build upon Super et al.’s theory of adult career development through understanding the implications of volunteering or unpaid work among recent retirees for their career self-concept.

Previous research has examined why older individuals volunteer and the benefits of volunteering (Callow, 2004; Chappell, 1999; National Governors Association [NGA] Center for Best Practices, 2008; Warburton, Terry, Rosenman & Shapiro, 2001; Wilson, 2000). Recent research suggests motivations to volunteer vary across the life-span and retirees’ volunteer motivations and experiences appear to be different from those of other cohorts (Boling, 2005; Harvard School of Public Health, 2004). The distinctiveness of retirees’ volunteer motivations is central to the rationale for this study, as it interprets volunteering within an adult career development framework, and in fact, builds upon that framework by presenting retirees’ volunteering as indicative of a new stage of career development.

This study uses two interdisciplinary theories in reference to career development among retirees: life-span, life-space theory of career development theory (Super et al., 1996) and the life course perspective (Elder, Johnson, & Crosnoe, 2004). These theories use different terms to
denote essentially the same concept. Specifically, life-span comes from psychology and life course comes from sociology. These concepts refer to human life across time, from birth to death, as well as the major age-graded life stages or milestones that individuals experience. Life-span and life course incorporate the developmental perspective about growth and change, and how individuals make transitions across life roles. Life-span is used predominately in this study, although these terms can and are used interchangeably. In addition, throughout this study, for brevity, career development theory or Super’s theory are used to refer to Donald Super’s life-span, life-space theory. Although there are several theories of career development, Super’s theory is the one this study used as its framework.

Also, in this study, the term ‘retiree’ is used to refer to the participants in the research, and is defined as individuals, age 55 and older, who have left their full-time job, are receiving some form of pension, and consider themselves to be retired from their primary career. The term retiree may not be embraced by all of the study’s participants, as this group consists of dedicated volunteers who in some cases may have a part-time job; however, it is a term that society recognizes as fitting individuals who meet the aforementioned criteria.

**Rationale**

A better understanding of the experiences and preferences of retirees who volunteer with nonprofit organizations is important because our population is aging. Nonprofit organizations, government and researchers have become increasingly interested in volunteering among middle-aged and older adults because of an anticipated growing potential for volunteering in an aging society (Corporation for National and Community Service, 2007; Denison, 2007; Einolf, 2009; Government of Canada, 2010; Harvard School of Public Health, 2004; Hong, Morrow-Howell, Tang & Hinterlong, 2009; Rabiner, Koetse, Nemo & Helfer, 2003; Volunteer Canada, 2009).
Thirty-six percent of people age 65 and older engage in volunteer activities, with individual older adults volunteering huge numbers of hours and older adults as a group also contributing the most number of volunteer hours (Hall, Lasby, Ayer & Gibbons, 2009). Workers tend to retire between the ages of 55 and 64, and Canada has never had so many people on the cusp of retirement (Statistics Canada, 2010a). With increases in life expectancy, older people can expect to spend as much as 25 to 30 years in retirement (Nouroz & Stone, 2006). While volunteering is associated with physical and mental health benefits for older adults (Fried et al., 2004; Kim & Pai, 2010; Schooler & Mulatu, 2001; Wilson, 2000), if retirees donate part of their leisure time to volunteer with nonprofit organizations, they can also have an immense economic and social impact on society (Statistics Canada, 2008).

Because older volunteers tend to contribute large numbers of hours, they are an extremely important and a highly valued resource in the nonprofit sector, especially for organizations that rely on volunteers for their sustainability (Canada Volunteerism Initiative, 2005). The services that nonprofit organizations provide are in great demand and this demand has continued to increase during the current economic downturn. When budgets are tight and staffs are overworked, volunteers step in to meet growing demands, provide services and keep organizations going. Organizations need to adapt to the changing demographics of the volunteer workforce to ensure sustainability. Studying the experiences, preferences and learning goals of older volunteers is particularly important as the population continues to age.

Nonprofit organizations and their volunteer managers want to enhance the recruitment, placement and retention of older volunteers. Innovative ways of meeting the needs of older volunteers are necessary. By exploring retirees’ volunteer experiences, this study can assist
nonprofits to better understand retirees’ experiences, goals and preferences and assist them with volunteer management issues.

Exploratory studies provide the opportunity to generate information and insight on a topic that has received very little scientific attention (Creswell & Clark, 2007). The lack of research on retirees’ volunteer activities from a career development perspective justifies the exploratory nature of this study. This study is a developmental mixed-methods design with two phases (Creswell & Plano Clark, 2007; Greene & Caracelli, 1997; Tashakkori & Teddlie, 2003). In Phase 1, qualitative interviews were conducted with 12 participants to better understand retirees’ volunteer experiences. Phase 1 informed the design of an instrument for the Phase 2 survey which examined the issues among a larger sample of retirees who volunteer. Finally, the results of Phases 1 and 2 were integrated to provide insights into the transference of aspects of previous paid work into volunteer activities among the participants (Collins, Onwuegbuzie, & Jiao, 2007; Teddlie & Yu, 2007). Both in its research questions that follow and in its design, the study seeks to address the linkage between volunteering in adults who have retired from their paid jobs and adult career development theory.

The questions addressed in Phase 1 were:

1) Do retirees use the skills and abilities that they developed through their paid work experiences in their volunteer activities?

2) Do retirees use the knowledge that they developed through their paid work experiences in their volunteer activities?

3) Are the contexts of retirees’ paid work experiences and their volunteer activities similar?

4) What learning opportunities do retirees have through their volunteer activities?
5) Do retirees’ career self-concepts change through their volunteer activities from those they developed during their paid work careers?

The questions examined in Phase 2 included questions 1, 2, 3 and 5 above in addition to the questions outlined below:

6) What factors contribute to participants’ choice of activities?

7) Are retirees’ career self-concepts related to the utilization of skills, abilities and knowledge in their volunteer activities?

In addition, in Phase 2, research question 4 is modified and becomes:

4) What learning goals do retirees seek to fulfill through their volunteer work?

Implications of this Study

This study has important implications for nonprofit organizations, the larger society, and older volunteers themselves. First, the changing demographics of greater numbers of retirees and increased population life-spans (Statistics Canada, 2002) means that more older people have the time to volunteer, if they so choose. In addition, as our Canadian population continues to age, retirees’ opportunities for development become more critical. By further developing and expanding Super et al.’s (1996) theory to incorporate retirees’ experiences, this research can shape society’s view of older adults beyond their paid work careers and into the sphere of unpaid work. Second, with the economic crisis, the need for services from nonprofit agencies continues to rise as governments have cut back funding to these organizations (Evans & Shields, 2005). Volunteers are doing much of the work at nonprofit organizations, but due to high demand, more volunteers are required and there is a need to retain current volunteers (Canada Volunteerism Initiative, 2005; Foster-Bey, Grimm, & Dietz, 2007; Gottlieb, 2002). This research may have implications for volunteer recruitment and retention policy and programming among nonprofits
by helping them understand the needs and preferences of retirees who volunteer. Third, because of the pressures faced by nonprofit agencies, volunteers need to be studied. This research examines a key segment of volunteers: retirees, who contribute the most volunteer hours to these organizations (Hall, Lasby, Gumulka, & Tyron, 2006). In order to successfully recruit and retain this important group of volunteers, nonprofit organizations need to better understand retirees’ needs and motivations for volunteering. This research should help nonprofits address retirees’ lifelong learning and career development needs. Finally, this research should assist older people with the transition out of paid work and into retirement as well as providing a better understanding of how volunteering impacts their career self-concept. It can also help retirees recognize opportunities for lifelong learning through the pursuit of new experiences.

**Situating Myself in this Research**

I have seen how satisfying volunteering is for young and old alike. For some time I have wondered whether the baby boomer generation as a group (who number almost 10 million in Canada) will engage in volunteer pursuits during retirement. My interest in volunteering comes from many sources: my own experiences with volunteering, my observations during the field placement and the adult development and aging courses I taught at the University of Guelph, and the concept of ‘linked lives’ (Giele & Elder, 1998) because my parents and grandparents volunteered and they have influenced me.

As a gerontologist and adult educator, I enjoy studying adults, especially older adults. My interest in aging developed through seeing how the baby boomers influenced society as they passed through various life milestones. Retirement will be no different. However, baby boomers are not alone in their desire to redefine retirement; other seniors are with them. This means that society should be prepared for a lot of redirection.
Finally, my close relationship with all four of my grandparents and my two step-grandparents has also affected me. I was fortunate to have had many years to get to know them. My grandfather is celebrating his 98th birthday in October, 2010. I see the long life that my grandfather has led, and know that I will find my own ‘direction’ during later life, if I am blessed with as many years as he has enjoyed.

**Chapter by Chapter Outline of This Study**

Chapter 2 discusses volunteering, presenting recent statistics on the extent of volunteering and explores volunteering among older adults. It highlights the reasons why older adults volunteer and discusses the benefits of volunteering. It presents the literature on volunteering and lifelong learning. Chapter 3 explores life-span, life-space career development theory (Super et al., 1996), how it is related to the life course perspective (Giele & Elder, 1998), and how it can contribute to our understanding of volunteering among older adults. Chapter 3 also explores the dimensions of learning (Illeris, 2004). Chapter 4 presents the methodology for this research. Chapter 5 discusses the findings from the exploratory and developmental Phase 1 case study and Chapter 6 presents the findings from the Phase 2 survey. Chapter 7 discusses the findings from both phases using Super’s (1996) theory as the interpretive framework and also referring to life course perspective. Chapter 7 also discusses limitations of this study and directions for future research.
Chapter 2: Volunteering and Learning

“What matters most are family, friends and what you did to help build society.”
David Pecaut, explaining his mother’s advice to him

“Learning is not a product of schooling, but the lifelong attempt to acquire it.”
Albert Einstein

“You don’t stop learning when you grow old; you grow old when you stop learning.” (Canadian Council on Learning, 2006, p. 2)

This chapter examines the research literature on volunteering and learning. It begins with a definition of volunteering, followed by an exploration of volunteering in Canada and in the United States. Then, volunteering among older adults and baby boomers is examined. Next, recent research on paid and unpaid work and the need for both in society are explored. The interest in civic engagement and volunteering among seniors is discussed. Finally, informal learning, lifelong learning and the health benefits of learning are examined.

Volunteering

Volunteering is when people freely give their time and energy to nonprofit organizations, neighbours, friends and family, normally without direct financial compensation (Cnaan, Handy & Wadsworth, 1996; Hall et al., 2006; Hall et al., 2009). Cnaan et al. (1996) present volunteering in relative terms and acknowledge that some forms of volunteering meet the ideal more than others. In a series of studies, they apply a cost/benefit framework that acknowledges that volunteers obtain some benefits from volunteering but also absorb costs (Handy, Cnaan, Brudney, Ascoli, Meijs, & Ranade, 2000). Handy et al. are among many economists who question pure forms of altruism as a basis for volunteering (Andreoni, 1990).
Past Canadian research in the volunteering field has focused on formal volunteering (Hall et al., 2001; Hall et al., 2005; Hall et al., 2006; Hall et al., 2009). Other researchers have investigated informal volunteering, also referred to as community participation (Connidis, 2001; Zedlewski & Schaner, 2006). Formal volunteering involves engaging in activities at or through a nonprofit organization or agency. Informal volunteering refers to helping friends, family and neighbours, and this good will and reciprocity in the community is what Robert Putnam referred to as social capital (Putnam, 1995; Putnam, 2000; Sander & Putman, 2010). Helping people through informal volunteering can involve emotional and instrumental support for household management tasks and friendly visiting with an older neighbour. While informal volunteering is important, this study will focus on formal volunteering.

Some of the literature refers to volunteering as a category of unpaid work (Livingstone, 2010), and while unpaid, volunteering is work; however, to distinguish it from paid work, retirees' volunteer work will be referred to as volunteer activity or activities in this study. This term also distinguishes volunteering from the work of the paid staff at nonprofit organizations (Handy, Mook & Quarter, 2008).

**Nonprofit organizations and volunteering.** The volunteer contributions of people across the country have had an enormous impact on all aspects of Canadian society. Nonprofit organizations, which include community organizations, religious congregations, charities, and foundations, contribute greatly to the economy, hence the development of the term the ‘social economy’ to acknowledge the economic impact of nonprofit organizations, cooperatives and other organizations in the third sector of the economy (Quarter, Mook & Richmond, 2003b; Quarter, Mook & Armstrong, 2009). Canada has an estimated 161,000 incorporated nonprofits (Hall et al., 2005) and the GDP of the core nonprofit sector, estimated at $31.0 billion in 2005,
accounted for 2.4% of the overall economy (Statistics Canada, 2008). When hospitals, universities and colleges are included, this share increased to 6.8% or exceeding $86.9 billion (Statistics Canada, 2008). Furthermore, the GDP of the core nonprofit sector grew significantly faster than the Canadian economy as a whole, increasing by an annual average 7.0% between 1997 and 2005.

Nonprofit organizations rely heavily on volunteers (Statistics Canada, 2004). In a Statistics Canada survey of nonprofits during 2003, 54% were without any paid staff and another 26% only had from one to four staff (Hall et al., 2005); in other words, 80% of nonprofit organizations in Canada had four or fewer staff. For organizations of this sort, volunteer labour is of great importance for their sustainability (Canada Volunteerism Initiative, 2005). The aforementioned Statistics Canada survey also noted that volunteers contributed to nonprofit organizations more than 2 billion hours for the year 2003, the equivalent to more than one million full-time jobs (Hall et al., 2005).

The services that nonprofit organizations provide are in great demand and this demand has continued during the current economic downturn. When budgets are tight and staffs are overworked, volunteers can step in to meet growing demands, provide services and keep organizations going. Volunteering in the community is a benefit to society and important for our quality of life (Livingstone, 2008, 2010) because volunteers provide services in organizations throughout the community that touch everyone in some way (Graff, 2007; Pennings & Van Pelt, 2009).

While there is broad recognition of the social contribution of volunteers, the economic value of this work is not acknowledged as frequently. Going beyond the standard value of the GDP, the replacement cost of volunteer labour can be calculated by determining the cost if the
same services were purchased through the paid labour market. Mook, Handy and Quarter (2007) report that in 1999, when the value of volunteer work is included, the GDP of the nonprofit sector rises to 8.5% or $75.9 billion. Even without adding in the value of volunteer labour, Canada’s nonprofit sector is larger than many major industries (Statistics Canada, 2004). Clearly nonprofits have a large economic impact and there is great value brought to our society through community organizations, their staff and their volunteers.

**Rates of volunteering in Canada.** The Canada Survey of Giving, Volunteering, Participating (CSGVP) presents a comprehensive look at Canadians’ contributions to nonprofit and charitable organizations. Most recently, the CSGVP survey was conducted in 2004 and 2007 (Hall et al, 2009).

In 2004, Hall and his colleagues (Hall et al., 2006) found that almost 12 million Canadians, or 45% of those aged 15 and older, volunteered. The number of hours volunteered was equivalent to about 1 million full-time jobs. Canadians were most likely to volunteer in social service agencies, education and research, sports and recreation, and religious organizations. Hall et al. (2006) found that the volunteer rate during 2004 for Canadians age 45 to 54 was 47%, and it was 42% for those aged 55 to 64. However, the volunteer rate for Canadians age 65 and older was comparably low: 32%. This indicates that peak volunteer involvement occurs during the pre-retirement years. This drop off in volunteering after age 65 could be due to health changes, mobility, or other interests that take priority, and needs to be explored further (Michael Hall, personal communication, April 27, 2007).

In 2007, almost 12.5 million Canadians age 15 and older volunteered, representing 46% of the population and almost 1.1 million full-time jobs (Hall et al., 2009). Canadians continued to be most likely to volunteer with organizations undertaking sports and recreation, social services,
education and research and religious services. Hall et al. found that during 2007, the volunteer rate for those aged 45 to 54, 55 to 64 and 65 years of age older was 48%, 40% and 36% respectively.

**Rates of volunteering in the United States.** In the United States, volunteer rates are highest for those age 35 to 54 years of age and lowest for those age 65 and over, with the latter group donating the most time to volunteer activities (Harvard School of Public Health, 2004). A U.S. study also found that episodic volunteering had increased between 1974 and 2005 (Corporation for National and Community Service, 2007). Episodic volunteering is when individuals perform service on a short-term task. Certain individuals might prefer this kind of volunteer arrangement, such as older adults who like to travel during portions of the year.

Some U.S. research has shown that older adults who volunteer during their working years also tend to do so during retirement (Harvard School of Public Health, 2004). This indicates that attracting adults to volunteering prior to retirement is critical.

**Focus on Retirees and Older Volunteers**

In Canada about 13% of the population is age 65 and older, and this figure is anticipated to increase to about 20% by 2030 (Statistics Canada, 2002). With increases in life expectancy, older people can expect to spend as much as 25 to 30 years in retirement (Stone et al., 2006).

Retirement has been defined in different ways and there is not a consensus among researchers. Some of the common approaches to defining retirement are: 1) leaving one’s career, job or work; 2) collecting one’s employer-sponsored and/or government pension; 3) departure from the labour force; 4) self assessment of retirement; and 5) some combination of these indicators (Bowlby, 2007; Denton & Spencer, 2009). This study assessed retirement based on four criteria: Participants had to have left their main employer; if working they must have taken
new employment; they must be receiving a pension of some kind; and they must perceive themselves as retired.

Retirement paths are becoming more complex. It is common for individuals to have more than one retirement; individuals can retire from their job, but remain in the labour force and take new work (Cahill, Giandrea & Quinn, 2006; Statistics Canada, 2007b). Individuals are no longer retiring at the traditional age of retirement in part because legislative changes that eliminate mandatory retirement provide choice (Castonguay, 2006). Moreover, the path to retirement has greater variability, for example: gradual retirement, phased retirement, semi-retirement and bridge jobs (Cahill, Giandrea & Quinn, 2006; Settersten, 1998; Davis, 2003).

Researchers and the media have been interested in retirement transitions; however, the research on adaptation to retirement has demonstrated contradictory findings (Wang, 2007; Moen, 1996). This is may be due to the complex nature of the relationship between health and retirement (Moen, 1996), methodology and individual differences (Wang, 2007) or the differences in defining retirement (Bowlby, 2007; Denton & Spencer, 2009).

The average age of retirement was around age 65 from the mid-1970’s to the mid-1980’s (Statistics Canada, 2007b). Recently, public and private retirement income programs and policies have encouraged earlier retirement from the workforce (Castonguay, 2006; McDonald, 2006; Moen, 1996; Nouroz & Stone, 2006; Statistics Canada, 2007b). As noted above, recent research indicates that 36% of all those over age 65 volunteer with a community organization (Hall et al., 2009), and some research indicates that interest in volunteering is very high at one to two years post-retirement (Caro & Bass, 1997). In 2005, the average age of retirement in Canada was 60.0 years for women and 62.5 for men (Nouroz & Stone, 2006; Schellenberg, Turcotte & Ram, 2006). There is slight variation in age at retirement, with immigrants generally retiring later than
Canadian-born older adults. In 2002, the average age at first retirement for immigrants was 61.5 years, compared to 59.7 years for non-immigrants (Statistic Canada, 2007b). A higher proportion of immigrants (about 30%) retire at age 65 or older, compared to non-immigrants (19%). If individuals continue to enter retirement at relatively young ages, they may be available earlier than the ‘golden age’ of 65 to volunteer. There continues to be a great demand for older volunteers, especially those who are in retirement. Older adults are desirable as volunteers because of their skills and their availability during traditional work hours (Chambré, 2003).

Furthermore, today’s retirees are generally energetic and physically and mentally healthy (Castonguay, 2006; Statistics Canada, 2002; Statistics Canada 2007b; Warburton et al., 2001); they tend to live in their own homes and remain active in their communities. The current generation of retirees is relatively well-educated, has a long life expectancy (Statistics Canada, 2002), and continues to learn and contribute to society. Based on this, retirees can bring a lifetime of experience and wisdom to nonprofits (Moen, Fields, Meador, & Rosenblatt, 2000; Warburton et al, 2001).

The new view of aging is one of active seniors, and they have a lot to potentially offer nonprofit organizations if they choose to volunteer (National Seniors Council, 2010). Organizations will need assistance to understand the needs and preferences of current and potential volunteers for their recruitment efforts.

**Volunteering among Baby Boomers in our Aging Society.** The aging of the baby boomers has captured the interest of many people in society and the literature on civic engagement and volunteering has recently focused on middle-aged baby boomers (Corporation for National and Community Service, 2007; Cook & Gelfusa, 2009; Denison, 2007; Eisner, Grimm, Maynard & Washburn, 2009; Harvard School of Public Health, 2004; Zedlewski &
Schaner, 2006). The aging of the population combined with the large cohort of aging baby
boomers have generated this keen interest. Never have there been so many people on the cusp of
retirement (Statistic Canada, 2007a).

In the United States, research comparing the rates of volunteering among different age
cohorts at the same point in the lifecycle indicates that the volunteer rate (31%) for baby
boomers (born between 1946 and 1964) is in fact higher than the rate was for the so-called
greatest generation (born between 1910 and 1930) and the silent generation (born between 1931
and 1945), 25% and 23%, respectively (Corporation for National and Community Service,
2007). The increase among baby boomers has been explained with the higher levels of education
that baby boomers have, and the fact that they still have children under age 18 living at home.
Volunteer rates increase with higher levels of education, and adults with school-age children
living with them are more likely to volunteer than those without school-aged children in the
home (Corporation for National and Community Service, 2007).

Volunteer Canada has recognized the opportunity to attract baby boomers to
volunteerism with their 2009 Healthy Aging and Volunteering campaign. There is growing
interest and attention paid to this potential volunteer workforce and there seems to be a new
image of seniors. In addition, baby boomers approaching retirement are seen as more active than
previous generations.

The baby boomer cohort is viewed as relatively healthier, more affluent and better
educated than the older generations of adults (Statistics Canada, 2007b). The baby boomers have
had many advantages over the previous cohort of seniors, especially with their higher levels of
education and literacy. These factors are associated with increased volunteering, creating the
expectation that baby boomers will be more likely to volunteer during later life (Corporation for
A lot of research has been conducted on the baby boomers. One study found that baby boomers tended to volunteer with different organizations than the previous generation did at a similar age. Baby boomers volunteered more often with educational and youth services, and social and community service organizations, whereas the previous generation tended to volunteer more with religious organizations (Corporation for National and Community Service, 2007). Einolf (2009) found that past volunteering was the key predictor of future volunteering among baby boomers, and he recommended that boomers be recruited to volunteer while they are still in the workforce. Additionally, if a larger proportion of boomers become volunteers, Einolf recommends that nonprofit organizations focus on volunteer management to support the large aging baby boomer cohort.

**Contribution of Senior Volunteers.** In 2004, Canadian volunteers of all ages contributed almost 2 billion volunteer hours to organizations (Hall et al., 2006). Volunteer rates were highest among Canadian youth, perhaps due to the mandatory service requirements within the school system for high school graduation in certain jurisdictions. While the volunteer rate for seniors is lower than that for other age groups, seniors who do volunteer contribute more hours than those from other age groups (Hall et al., 2006). While volunteer rates among adults have been increasing over the last 10 years, adults age 65 and over volunteer at a lower rate than middle age adults do. However, researchers have consistently found that older adults contribute large numbers of volunteer hours compared to other age groups (Chappell, 1999; Hall, et al., 1998; Hall, et al., 2006; Hall et al., 2009; Harvard School of Public Health, 2004). In 2004 and 2007, adults age 65 and over contributed an average of 245 hours and 218 hours, respectively, an
amount which is greater than other adults (Hall et al., 2006; Hall et al., 2009), a point illustrated in Table 2.1.

Table 2.1

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Note: The numbers in this table were compiled from the following sources: Hall, Knighton, Reed, Bussière, McRae, and Bowen, (1998); Hall, McKeown, & Roberts (2001); Hall, Lasby, Gumulka, and Tyron, (2006); Hall, Lasby, Ayer, and Gibbons (2009).

For example, in 2004, volunteers age 15 and over contributed an average 168 hours to community organizations over the course of a year, while volunteers age 65 and older contributed an average of 245 hours (Hall et al., 2006). In 2007, these figures were an average of 166 hours and 218 hours, respectively and these differences persist when median annual volunteer hours are examined (Hall et al., 2009). Older volunteers contribute a great number of volunteer hours to nonprofit organizations.

Some individuals tend to provide the majority of volunteer hours to nonprofit organizations (Hall et al., 2006; Hall et al., 2009; Reed & Selbee, 2000). The top volunteers are
key resource for nonprofit organizations and all age groups are represented among those considered to be top volunteers (Hall et al., 2009). In 2007, the top one quarter of volunteers contributed 171 volunteer hours or more, representing 78% of all volunteer hours (Hall, et al., 2009). This figure is not much different from 2004 when the top one quarter of volunteers contributed 180 or more hours, or 77% of total volunteer hours. In 2004, the top 10% of volunteers contributed 52% of total volunteer hours (Hall et al., 2006). Moreover, retirees who volunteer tend to volunteer more hours than people the same age who are still in the workforce (Einolf, 2009). Society relies on a small minority of individuals who are dedicated volunteers (Pettings & Van Pelt, 2009; Reed & Selbee, 2000). This finding highlights the need to consider the number of volunteer hours as an important variable in research on older volunteers.

Dosman, Fast, Chapman and Keating (2006) found as men and women moved out of paid work into retirement, the time previously spent on paid work is redistributed across volunteer, domestic and caring work. Some retired respondents continued to spent time doing paid work. Men and women who volunteered spent about the same amount of time volunteering. Those who were retired or working part time were more likely to be engaged in volunteer and domestic work. In addition, retired men volunteered more hours than did non-retired men, and twice the proportion of retired men volunteered as non-retired men.

Choi (2003) examined whether employment status affected older adults’ decision to volunteer and the number of hours available to volunteer. She compared volunteers and non-volunteers who worked and were age 70 and older. Her findings indicated that part-time workers were more likely to volunteer than those who worked full-time. Choi also found similar socio-demographic results as previous research: Workers in professional, managerial, clerical, sales, or service positions were more likely to volunteer than those in manual jobs; individuals with
higher levels of education were more likely to volunteer; volunteering increased with income levels; and married people were more likely to volunteer than single people. Choi also found that the rate of volunteering declines with advancing age. In addition, Choi found that Black people were more likely than White people to volunteer; individuals who volunteered were more likely to report better health; and that part-time workers reported more volunteer hours than those who were not working at all. Volunteers in the Choi (2003) study reported retrospectively that they contributed 10 hours of volunteer work per week, almost double the average number of volunteer hours as previous studies have reported for those age 65 and older; hence the results for how employment status is related to volunteer hours may not be accurate. In some related recent research, Tang (2008) found that highly educated older adults were more likely than lower educated ones to volunteer; however, volunteers did not significantly differ by income levels. In addition, Webb & Abzug (2008) found that those in professional, managerial and military occupations were more likely to volunteer.

Another study (Zedlewski et al., 2006) found that working adults age 55 and older volunteer more than those who are not working. Also, non-working adults age 55 and older engage in formal volunteer activities somewhat more than adults who work full-time, when accounting for other characteristics that affect volunteering. In addition, part-time workers are more likely to volunteer formally and informally when compared to full-time workers. However, they found that volunteers who do not work for pay spend the most number of hours volunteering. These researchers also found that men volunteer informally more often than women do, after taking into account education, work status and health differences between the sexes. Older adults who are religious, earn higher incomes, have higher levels of education and are in good health tend to volunteer more often. Finally, healthy older adults are the ones most
likely to volunteer, with this effect most strongly seen through their increased probability of volunteering informally. This study indicates that work status and health should be included in research on older adults and volunteering.

**Why Do Seniors Volunteer?**

Chambré (1984, 2003) stressed that there is little evidence that volunteering is a substitute for the loss of paid employment or the loss of family responsibilities in retirement. Instead, volunteering is a way of dealing with change, and continuing and expanding one’s commitment to the community.

The research on older people and volunteering indicates that demographic variables (education, age, sex, occupation), and social factors (church attendance) are associated with volunteering (Warburton et al., 2001; Wymer, 2003). Other research has examined altruistic motives (social responsibility) and motives of self-interest (social interaction) to help explain why older people volunteer (Callow, 2004; Chappell, 1999; Smith, 2004; Warburton et al., 2001; Wymer, 2003). Research also found that those who volunteer during their youth have a greater probability of volunteering when they are older (Chappell, 1999), and that retirees who volunteer also tended to volunteer during their working lives (Harvard School of Public Health, 2004).

Using interviews, with a small sample, Callow (2004) found that retirees described four motivations for volunteering: a sense of feeling good about oneself, social interaction, structure in their schedule/day, and meaningful or significant activity. The retirees who discussed a sense of feeling good about themselves touched on aspects of identity and self-concept, and one retiree out of the eight interviewed mentioned the importance of having intellectual stimulation in volunteer activities. This relates to the idea of lifelong learning. Two of the participants in
Callow’s study discussed the importance of using skills and talents from their former paid work in their current volunteer activities.

Hall and his colleagues (2006) found that the top three reasons cited for volunteering were to make a contribution to the community, to use one’s skills and experience, and being affected by the organization’s cause. The respondents did not mention the desire for learning or gaining new experiences as a reason for volunteering.

Some previous research has examined the needs that volunteering fulfills among middle aged and older volunteers. Whereas Canadian youth volunteer to build their resumes and make useful contacts for employment, older volunteers generally do not (Chappell, 1999; Chappell & Prince, 1997; Handy et al., 2010; Hustinx et al., 2010). Seniors and middle-aged volunteers were equally likely to report they were volunteering out of altruism or self-interest (Chappell & Prince, 1997). Here, altruism was defined as helping others and helping the cause; self-interest included using skills, learning, meeting people and using spare time. Compared to middle-aged volunteers, older volunteers were more likely to volunteer out of religious obligation or an obligation to the community. None of this research examined skill usage in any depth by assessing whether these volunteers were using skills from their current or previous paid employment. This research also included learning within the same category as using skills, defining both as self-interest.

A recent study surveyed 71 business, public sector, and nonprofit leaders, who were within a few years of retirement, to determine how nonprofit and charitable organizations could best attract retired leaders as volunteers. This study did examine skills as well as learning and personal growth (Singh, Levin & Forde, 2006). Personal growth was listed as a motivation or reason for volunteering by 56% of retired leaders, and 73% of respondents stated that if they
volunteered in the future their top reason would be to fulfill a need or interest in learning. This study asked respondents about the type of volunteer activity in which they would like to share their skills. The majority of respondents mentioned they wanted to be engaged in short term, special projects (65%), coaching/mentoring (59%), management (56%), and governance (49%). Other categories prioritized were financial, personnel or project consultation (41%), environment (20%), fundraising (11%) and individual care (7%). A scan of this list of management and business skills indicates that most of these activities would probably relate to the skills these leaders had developed during their paid careers.

The literature indicates that seniors have multiple reasons for volunteering formally in their community. Apart from the Singh et al. (2006) study, previous research has tended not to investigate both skills and ability usage and learning or personal development. Skills and ability usage and learning or personal development are in the motive category of self-interest. Learning will be examined more in the next section.

**Predictors of volunteering.** Research indicates that older adults who volunteer are generally more active individuals and have a high level of connectedness to other people and to social institutions in general (Corporation for National and Community Service, 2007). Hence, married people and individuals who work for pay are more likely to volunteer (Choi, 2003). Older adults who work part-time are likely to combine paid employment with volunteering. Church attendance is associated with volunteering (Wilson & Musick, 1999; Musick, Wilson & Bynum, 2000).

Several recent studies indicate that predictors of volunteering among seniors include socioeconomic status, past history of volunteering and previous charitable giving (Einholf, 2009; Kaskie, Imhof, Cavanaugh & Culp, 2008). Musick et al. (2000) found that white Americans
volunteered more often than black Americans; however, blacks were less likely to be asked to volunteer and were also less apt to accept. Chambré (2003) found that educational achievement was the strongest predictor of volunteering, with college graduates volunteering later in life more than high school graduates. It has been suggested that engaging older workers in volunteer activities prior to retirement is critical to having them pursue volunteer activities during retirement.

Previous research on seniors who volunteer indicates that there is a relationship between an individual’s level of education and their involvement in the volunteer labour force (Chambré, 1993b, 2003; Kaskie et al., 2008); those having more education tend to volunteer. Research also indicates that potential volunteers from lower education levels and those in the trades and employed in manual labour tend not to volunteer (Tang, 2008). In addition, health status is associated with volunteering, with older adults who perceive their health to be poor or reporting poorer health less likely to volunteer (Dosman et al., 2006; Kaskie et al., 2008).

Volunteers are more likely to report awareness of volunteer opportunities, and this indicates that programs and policies that increase awareness might facilitate volunteering (Kaskie et al., 2008). In addition, organizations can make volunteering more attractive. Some volunteer recruitment programs made volunteering very attractive to older adults by offering them incentives such as stipends, carfare or a free lunch. Older individuals may be attracted to certain types of nonprofit organizations; one study found they tend to volunteer with various health and related caregiving organizations making up a great proportion of their volunteer labour force (Phillips, Little & Goodine, 2002).

During retirement, there is an increase in discretionary time, making greater room for volunteer activities. However, declines in personal health (Chambré, 1987) or the health of loved
ones may make volunteering difficult. In addition, exiting the workforce means individuals are outside the social networks where they may be asked to volunteer (Einolf, 2009).

**Benefits of volunteering for older adults.** Past research has shown that there are many benefits for older people who volunteer during their retirement years. Volunteering provides benefits such as better health and vitality as well as being associated with increased longevity (Chappell, Gee, McDonald & Stones, 2003; Lum & Lightfoot, 2005). Volunteers who provide direct service and more formal helping tended to benefit more than those providing indirect and informal support (Moen & Fields, 2002). Volunteering is also associated with social integration and increased social ties and social support and these may influence physical and mental health by buffering stress (Aquino, Russell, Cutrona & Altmaier, 1996; Rook & Sorkin, 2003; Wilson & Musick, 1999; Musick & Wilson, 2003). Volunteering, and long term volunteering in particular (Pushkar, Reis & Morros, 2002), leads to increased well-being (Zedlewski & Schaner, 2006), especially among retirees who do not participate in postretirement work (Moen & Fields, 2002). Research also confirms that volunteering increases self-esteem and self-confidence (Wilson, 2000).

In her review of recent research on health and volunteering, Swinson (2006) found 13 studies that examined this topic: seven studies found an overall reduction in anxiety and depression; six found improved self-esteem; five identified lower mortality rates; three noted improved immune systems; two studies found better weight control, lower blood pressure, and a speedier recovery from surgery; and one study found improved mental functions.

A study by Tackett (2001) found that retirees who were active volunteers, as opposed to working part-time, demonstrated higher levels of life satisfaction. Warr, Butcher and Robertson (2004) and Greenfield and Marks (2004) also found that volunteering was associated with life
satisfaction. While Wilson (2000) was not able to find research that supported whether volunteering increases life satisfaction and well-being over time, Van Willigen (2000) found that older volunteers had greater life satisfaction over time when compared to younger adult volunteers, and this was especially the case with higher rates of volunteer hours. Older volunteers also reported greater positive changes in health compared to younger volunteers. Some studies found significant reductions in morbidity and mortality among older volunteers compared to matched non-volunteers (Corporation for National and Community Service, 2007; Gottlieb, 2002).

In a longitudinal study, formal volunteering was associated with lower levels of depression; however, there was no benefit from informal volunteering (Li & Ferraro, 2005). Kim & Pai (2010) examined volunteering and depression and longitudinally followed a group of adults age 25 and older. They found that volunteering was associated with a decline in depression among individuals age 65 and over, but not for other ages. Contributing more hours to volunteering was also associated with a decline in depression. These studies are among the few studies to look at health factors longitudinally.

Overall, volunteering appears to be associated with better physical and mental health (Wilson, 2000) and new research indicates that volunteering does enhance physical and mental health, through processes involving cognitive, physical and social stimulation (Fried et al., 2004; Karp et al., 2006; Kröger et al., 2008; Schooler & Mulatu, 2001). This will be explored further in the section on learning and volunteering.

Most of these health benefits are found in studies with a panel design, and it is important to recognize that causal effects cannot be inferred because it is likely that healthier people are more likely to volunteer. One researcher sums up the research as stating: “Good health is
persevered by volunteering; it keeps volunteers healthy” (Wilson, 2000, p. 232). As previously mentioned, volunteering develops and expands people’s social networks and having a strong network is related to improved health; hence, part of the health benefit may come from stronger social networks (Aquino, Russell, Cutrona & Altmaier, 1996; Rook & Sorkin, 2003; Wilson & Musick, 1999; Musick & Wilson, 2003).

Paid and Unpaid Work

The intersection of paid and unpaid work is important to this study. Some recent research has specifically looked at this area.

Combining paid and unpaid work within retirement pursuits. Dosman et al. (2006) looked at mid-life and older adults and how they spent their time in productive activities during the year of the study. Productive activities were broadly defined to include paid and unpaid work such as caregiving, volunteering, household management and paid work. As previously discussed, these researchers found that retirees spent the time they once spent at paid work on caregiving, volunteering and household management. A small proportion of retirees remained engaged in paid work, and they combined paid with unpaid activities.

Jonsson, Josephsson and Kielhofner (2001) examined paid and unpaid work in retirement. These researchers are unique in that they viewed occupation more broadly than paid employment and their work has an important connection to this study. While a lot of retirement literature examines the psychological and cultural aspects of retirement, Jonsson, Josephsson and Kielhofner (2001) longitudinally followed a group of 32 workers over seven years, from the time when they were anticipating their retirement, until after they had retired in order to examine the occupational aspects of retirement. Occupation was synonymous with paid or unpaid work, and narratives were used to understand participants’ occupations, both pre and postretirement.
year seven, 12 participants were interviewed; some were retired and still working and others were retired and pursuing leisure activities. The main finding was that the participants were seeking engaging occupations or occupations that evoked a depth of passion or feeling, and these could be within paid work, leisure and hobbies, or formal or informal volunteering. Engaging occupations had six aspects in common: 1) they were highly meaningful because they were connected to participants’ interests, were personally challenging, enabled participants to demonstrate individual competence, and were worthwhile for family or society; 2) participants were highly committed to their occupations and participated intensely and regularly in them, and they had the expectation of a long term commitment to this activity; 3) over time, occupational involvement became more intense and interrelated activities also developed; 4) involvement changed from being for personal pleasure into a commitment or responsibility; 5) participants became connected within an occupational community; and 6) the engaging occupation took on many of the features of paid work so that participants thought about it and talked about it as work and it required the commitment and seriousness of their former work. In fact, participants commented that their occupation was sort of like work and a participant said “one could say that I work at my leisure time” (p. 429). These researchers stated that finding or not finding an engaging occupation made the difference in whether participants had positive life experiences as retirees. In addition, some of the participants acknowledged that after a while, the lack of external demands on their time felt like a void, rather than like the freedom they had originally anticipated. The participants also experienced unexpected events and opportunities; some these chance events were positive, while others were negative. Finally, the researchers suggest that the traditional meaning of the term occupation should be expanded.
Kaskie and his colleagues (2008) examined retired men and women involved in four different types of retirement: 1) those who the researchers considered to have taken on a civic engagement role; 2) those who volunteered less than five hours per week; 3) those who returned to work in part-time or seasonal employment; and 4) those neither working nor volunteering. The researchers defined those in a civic engagement retirement role as those who volunteered more than five hours per week as well as those who worked in an organization that has a direct impact on the local community, such as in schools, health care, social services and other nonprofit organizations. The researchers found that those involved in a civic engagement retirement role were different from the other three groups, with those involved in a civic engagement role more likely to be female and to be better educated. Those who returned to work in an occupation not defined as civic engagement were more likely to report that being paid for work was important and were less likely to state that there were volunteer opportunities in their community. In this study, 24% of retirees were classified within the civic engagement retirement role, 15% worked in an occupation not defined as a form of civic engagement, 21% volunteered fewer than five hours per week and 40% neither worked nor volunteered.

**Conflict between paid and unpaid work.** Aging advocates have long recognized that older adults are a human resource, and sought to encourage and expand social roles for older adults in paid and unpaid work that enable them to make social and economic contributions (Hong, Morrow-Howell, Tang & Hinterlong, 2009). In the research literature, there is a growing recognition that older adults are an important human capital resource, with their lifetime accumulation of skills, experience and wisdom. However, they are viewed as a human resource required by both nonprofit organizations and business (Denison, 2007; National Governors Association [NGA] Center for Best Practices, 2010; Price, 2002; Stone et al., 2006; Warburton,
Le Brocque & Rosenman, 1998). This view creates conflict and competition between nonprofit organizations and for-profit workplaces.

Some retirees remain engaged in paid work, either part-time or full-time, as employees or self-employed. The current economic situation may result in a delay of retirement; older adults may remain in the workforce full-time in order to rebuild their pensions, or opt to semi-retire or work part-time. This will reduce both the proportion of retirees and the discretionary time for volunteering among those who do begin their retirement; however, this remains to be seen.

Previous research indicates that active involvement in volunteer activities or work is beneficial for retirees (Morrow-Howell et al., 2004). For society, a key benefit of older workers continued paid work is the contribution to the economy, and for older adults, it is the provision of financial resources as well as the health benefits of being productive members of society (Castonguay, 2006; Moen, 1996).

Volunteering has been promoted for the benefits it offers, including for health reasons (Fried et al., 2004; Kim & Pai, 2010; Morrow-Howell et al., 2004; NGA Center for Best Practices, 2008; Rozario, 2007; Schooler & Mulatu, 2001; Zedlewski & Schaner, 2006). Volunteering provides avenues for personal development and fulfillment and volunteering among older adults and baby boomers is viewed as a benefit to society and government, and to boomers and older adults themselves; there are many programs that promote it (Kaskie et al., 2008). Older adults have been encouraged to volunteer as a way to be productive and involved in their communities (Chambré, 2003). More and more older adults in Canada and the U.S. have pursued volunteer activities. This can be due to an increased demand for volunteers in our society and recruitment programs geared towards older adults, as well as the fact that older adults are better educated and more financially secure than previous generations (Statistics Canada,
In addition, in the last couple of decades, nonprofit agencies have removed age restrictions that forced the oldest volunteers to ‘retire’ (Chambré, 1993a).

Organizations are looking for new ways to recruit and retain older volunteers (Gottlieb, 2002). In today’s society, with many dual income families having less time to devote to volunteer pursuits, older adults are an important source of volunteering (Price, 2002). Early retirement has become more common (Castonguay, 2006) and many early retirees are seeking to volunteer.

This conflict for human capital resources between paid and unpaid work ignores the fact that unpaid work is equally economically valuable (Dosman et al., 2006; Quarter et al., 2003b); volunteering is a productive pursuit in society because of the economic benefit of nonprofit services (Statistics Canada, 2008). From this angle, volunteering among retirees is viewed as a win/win that is a benefit to society, government and the retirees themselves (National Seniors Council, 2010). Finally, recent research has shown that there is a trend towards part-time work or ‘bridge jobs’ that are combined with volunteer work (Castonguay, 2006; Choi, 2003; Tackett, 2001). Older adults are a human resource with a wealth of skills, abilities and experiences. Society will benefit no matter where they decide to devote their time and energy because both paid and unpaid work are productive in society (Dosman et al., 2006; Quarter et al., 2003b). Some retirees are able to combine paid work with volunteering. Both avenues have the opportunity for fulfillment and leading an active, productive lifestyle. This view coincides with productive aging, where the three productive later life roles are working, volunteering and caregiving, and any activity seen as ‘productive’ is valued in our society (Morrow-Howell et al., 2004). The perspective of productive aging has developed as a counterpoint to the view that older adults are a drain on society and societal resources (Rozario, 2007), although the life
course perspective indicates that as lives ebb and flow, older people will engage in and disengage from different types of productive activity (Dosman et al., 2006).

Older adults who provide their labour in a volunteer capacity when they could have been paid for their work may appear to be taken advantage of. However, individual motivations, personality, preferences and tradeoffs have led some to choose volunteer opportunities over paid ones. The tradeoff between paid work and unpaid work requires further attention.

**Encouraging Seniors’ Civic Engagement and Volunteering in Society**

Related to this discussion is the increasing interest in citizenship education and the current call to increase civic engagement in society. This perspective is combined with a focus on shared values and common interest and a move away from consumerism in a market-based society (Bridges & Jonathan, 2003; Enslin & White, 2003). Civic engagement which combines volunteering, political mobilization and advocacy has been increasing in our society and it has been viewed as a pursuit for older adults during the retirement years (Kaskie et al., 2008; Martinson & Minkler, 2006; Rozario, 2007; Wilson & Musick, 1999). In the literature, there are questions and concerns over whether the generation of baby boomers are as civic-minded as the World War I generation, as discussed above.

In Canada and the U.S. there are calls to increase civic engagement and the active promoting of volunteering among older adults. In the U.S., the Harvard School of Public Health is promoting a redefinition and reinvention of society’s view of aging (Harvard School of Public Health, 2006). It has also launched a national campaign aimed at encouraging baby boomers to volunteer and contribute their skills and experience to strengthen communities. The National Council on Aging has implemented the RespectAbility project, the goal of which is to improve
the health and independence of older adults to assist them in contributing to their community and to society (National Council on Aging, 2009).

As mentioned previously, older people contribute the most number of volunteer hours and they are highly regarded as volunteers. In today’s society, with many dual income families having less time to devote to volunteer pursuits, older adults are an important source of volunteering (Price, 2002). Early retirement has become more common and many of these retirees are seeking to volunteer.

Organizations are looking for new ways to recruit and retain older adults as volunteers (Ashton & Parandeh, 2007; Cook & Gelfusa, 2009; Denison, 2007; Gottlieb, 2002; NGA Center for Best Practices, 2008). The volunteer bureaus across Canada have campaigns to attract older volunteers and Volunteer Canada is engaging baby boomers through a Volunteering and Healthy Aging campaign (Lapierre, 2009; Volunteer Canada, 2009).

**Instrumental perspective on retirement.** Overall, society has viewed civic engagement and volunteering as positive for older adults. Older adults are encouraged to be engaged partially because of the broad health benefits of community service and partly due to economic and other social benefits (Harvard School of Public Health, 2004; Martinson & Minkler, 2006; Price, 2002). However, civic engagement makes assumptions about being engaged, and the perceived meanings of aging and later life. Civic engagement has been criticized for its neglect of frail elderly and the dangers of politicizing volunteering (Martinson & Minkler, 2006). There may also be undue emphasis on marketable skills and work to accommodate economic needs (Bridges & Jonathan, 2003; Livingstone, Mirchandani & Sawchuk, 2008) for the benefit of nonprofits, government and society, which may be viewed as a market-based, instrumental, and human resources-focused perspective on volunteering (Weststar, 2009).
One negative image in society is of the older adult who is a drain on resources and is not contributing (Hendricks, 2005); hence retirees may find more positive images afforded by instrumental versus humanist volunteer activities. However, this begs the question of the function and purpose of volunteering in the lives of retirees – for personal fulfillment and personal development or solely for instrumental and political ends. Indeed, some critics argue that by promoting volunteerism, governments can reduce social service provision and funding to nonprofit organizations (Martinson & Minkler, 2006). This view, which is critical of underlying organizational and societal level motivations and attitudes towards older adults and volunteering, highlights the possibility that organizations may take advantage of the pool of labour which older adults represent. Societal expectations may put undue pressure on retirees to be contributing and productive and overemphasize their use of skills over and above other equally important retirement pursuits. In this economic climate, older adults are at risk of being viewed as a convenient volunteer force that can assist with the diminished budgets and the declining state role through their volunteer roles ((Freeman, 2002; Morrow-Howell, 2004). Using older volunteers as a source of volunteer labour does not change the broader social problems, and it sidesteps government responsibility. Although caution must be used to be aware of and avoid politicizing volunteering and taking advantage of older adults, optimistically older adults seem to have enough status and power in society to avoid this possibility.

The life course perspective (see Chapter 3) is important for recognizing that both personal and structural variables such as human agency, workplace factors, family factors, social policies and the organization of nonprofits themselves can impact civic engagement (Elder et al., 2004; Hendricks, 2004; Price, 2002; Stevens-Ratchford, 2005). For older adults, retirement roles that provide avenues for personal development and fulfillment are critical. It is important to
create opportunities for everyone to contribute to their communities who so desires it. This can be done through a variety of volunteer work with varying activity levels and to consider mobility impaired volunteers, who might be able to volunteer from their homes, as well as those undergoing rehabilitation who might have better health outcomes through community engagement (Stevens-Ratchford, 2005). Society is about collective living where productive aging, lifelong learning and personal development are all valued. Opportunities for learning and development, and the chance to use one’s skills and abilities are important for health and well-being. As the Canadian population continues to age, providing these opportunities will become more important. In addition, it will become increasingly critical to be conscious of the image of older adults within society and to be sensitive to how public policy impacts older adults’ life experiences (Hendricks, 2004, 2005).

**Education and Informal Learning**

Several topics within the education field have a bearing on this study’s investigation of lifelong learning and volunteering. The literature of informal learning and unpaid work, lifelong learning and the benefits of lifelong learning will all be described, starting with the neglected area of informal learning and volunteering.

**Informal Learning and Unpaid Work**

Learning can be defined as the gaining of knowledge, skill or understanding, consciously, explicitly or tacitly through individual or group processes and in any context (Livingstone, Mirchandani & Sawchuk, 2008). The learning that takes place through volunteering can be viewed as self-directed informal learning (Livingstone, 2008). It may also involve continuing adult education (institutionally-organized workshops), or informal education and training where a mentor instructs volunteers who are learning job skills or community development activities.
Very little of the education literature has examined the intersection of informal learning and volunteering (Schugurensky, Duguid, & Mündel, 2010; Duguid, Slade, & Schugurensky, 2006; Schugurensky, 2000). Nevertheless, research demonstrates that there is wealth of informal learning taking place through volunteer work (Schugurensky, Slade & Luo, 2005).

Two surveys, the 2004 WALL survey and the 1998 NALL survey, examined informal learning (Livingstone, 2008). Both surveys found that individuals engaged in informal learning through volunteering for an average of 4 hours per week (Livingstone, 2008). However, previous research on volunteering has not investigated learning as a motivating factor for volunteering (Schugurensky et al., 2010). Volunteers who are study participants have not been given the opportunity to explain that learning was one motivating factor for their volunteer involvement nor to describe their learning goals. Learning through volunteering has been ignored until recently; this study will address this gap and explore openness to learning and informal learning goals.

Nimrod and Kleiber (2007) examined learning, innovation and constancy in retirement activities among 20 men and women. The retirees were not all involved in volunteer activities; some were engaged in leisure and hobbies. However, the researchers found that some retirees did pursue completely new activities whereas others maintained continuity with their pre-retirement work. The retirees were more likely to report high well-being if they had found new meaning in life through their retirement activities. They reported how important their activities were for creating an opportunity for a more challenging and meaningful life. The researchers viewed the activities as a growth mechanism for creating or deepening meaning in life.
**Lifelong Learning**

We are always learning in our learning society (Jarvis, 2004). Learning takes place from birth until death. This lifelong learning encompasses formal education and informal learning, across different types of social contexts: formal schooling, further education and continuing education, informal learning programs, apprenticeships, self-taught learning, paid work learning and unpaid work learning (Livingstone, et al., 2008). Individuals learn within the social context, from their experiences and from modelling the behaviour of others (Illeris, 2007; Jarvis, 2004). Job-related learning and skills development are important; however, people also need to learn for personal development and growth (Sinnott & Berlanstein, 2006).

Little research has examined informal learning among those age 65 and older; however, the research that has been conducted indicates that older adults are active in learning pursuits (Livingstone, 2010). Lifelong learning is important because research indicates that on-going mental stimulation is important for well-being and mental health, and this will be discussed next.

**Benefits of lifelong learning and volunteering.** Learning is basic to human life (Hoare, 2006; Illeris, 2004, 2007; Jarvis, 2004). Active learning through volunteering provides benefits to older adults; it enhances social connection, develops new interests and connects older adults to younger generations (Canadian Council on Learning, 2006). Active learning includes formal education, leisure activities and professional pursuits.

Over and above the human need to learn (Illeris, 2004), active learning has been shown to be preventative for cognitive decline and brain loss, and for decreasing age-related physiological changes in the brain that begin to affect some people at approximately 60 or 70 years of age (Canadian Council on Learning, 2006). This brain loss can affect memory in older adults. Recent research has shown that there are significant mental health benefits for older adults who do intellectually complex leisure activities, as these activities can significantly decrease the risk of
cognitive decline and dementia in old age, including the risk of Alzheimer’s disease (Karp et al., 2006; Kröger et al., 2008; Schooler & Mulatu, 2001).

Leisure activities that provide a lot of mental stimulation have shown some promising results for mental health in older adults, especially when physical and/or social elements of these activities have also been present, providing further stimulation (Fried et al., 2004; Karp et al., 2006). One study (Fried et al., 2004) found that volunteering among older adults for health promotion and generativity purposes led to higher cognitive, physical and social activity and the researchers state that this has the potential to improve health outcomes in older adults.

During retirement, volunteering may make up a large part of discretionary or leisure time, and may take on a greater role in the provision of cognitive stimulation, physical activity and social engagement. This finding means that a greater number of older adults will be seeking avenues for stimulation in order to avoid Alzheimer’s disease and other dementias.

In addition, there has been an association between cognitive stimulation on the job and a decrease in dementia, with occupations requiring higher cognitive complexity associated with decreased dementia risk (Kröger et al., 2008). Researchers have found that older people who use cognitive abilities in jobs or activities that require thinking and problem-solving have lower rates of dementia and show less decline on cognitive tests that those who do not (Fried et al., 2004; Karp et al., 2005; Schooler & Mulatu, 2001; Zedlewski & Schaner, 2006).

Overall, learning and cognitive stimulation are required throughout life. Research indicates that older adults active learners (Canadian Council on Learning, 2006; Fried et al., 2004; Livingstone, 2008), and this reinforces the view that learner role is present across the life-span (Super et al., 1996).
Conclusion

This chapter has discussed the research on volunteering among older people. Previous research has examined volunteer rates, both in Canada and the United States, volunteering among baby boomers and older adults, focusing on motives for volunteering, predictors of volunteering and the benefits of volunteering. The number of hours contributed and volunteer organization type have also been investigated. Research has examined volunteering from several different perspectives, using a variety of theories. However, limited research has been conducted on volunteering and learning, and this issue is important to this study.

The growing research on older adults and volunteering is a testament to the importance of this issue. As a cohort, older adults tend to be educated, healthy and energetic. Older adults tend to contribute the most volunteer hours to nonprofit organizations, and there is growing evidence of the benefits that older adults gain from volunteering.

In examining the transference of previous paid work factors to volunteer activities among older adults, and how this influences career self-concept, this study connects the issues of paid and unpaid work and lifelong learning and makes a unique contribution to this field. Older adults can and do contribute to society through paid and unpaid work; both types of participation are a benefit to society and to older adults personally. Clearly, this author is an aging advocate and views healthy and successful aging as important. This is why theoretical perspectives that value older adults’ development and advocate for successful aging were chosen for this study; these theories are the focus of the next chapter.
Chapter 3: Theoretical Framework

“It is the theory that decides what can be observed.” Albert Einstein

Theories help us to better understand a phenomenon and enable us to expand and integrate knowledge (Chappell, McDonald & Stones, 2003). Albert Einstein’s quote is a reminder that the theoretical perspective taken can provide insights, but also create bias in the research. Furthermore, theories help us to predict future discoveries and new knowledge. In addition, theories have practical application; the knowledge gained through theory development can provide interventions and solutions to social problems. This should be the goal with research, and this study is no exception.

This research is interdisciplinary and integrates theory from several different fields. This chapter presents the key theoretical perspectives that frame this work. First, this chapter explores the primary theory upon which this study is structured: Donald Super’s life-span, life-space theory of career development (Sharf, 2006; Super et al., 1996). The rationale for using this theory is described. Then, it discusses the literature on career development, showing that there is a need to better integrate retirement into the life-span, life-space theory of career development. It also outlines the key concepts of this theory as they inform the development of the research questions. Finally, since this research is interdisciplinary, the two additional theories that were used to interpret the research findings and integrate the results from Phase 1 and Phase 2 are outlined: 1) the life course perspective, and 2) the dimensions of learning. The key tenants of these perspectives are discussed because they are revisited in chapter 7, the discussion chapter.
Applying Career Development Theory to Older Adults

“Careers really evolve over the years – they emerge from a person’s experience.”
Donald Super (in a question and answer interview by Freeman, 1993, p. 255)

This study uses Donald Super’s life-span, life-space theory of career development (1990) to examine volunteering among retirees, and in this study, career development theory is used as a synonym for Super’s theory. At first glance, it is perhaps counterintuitive to apply a theory about the development of career to the ‘denouement’ of career; this is precisely what this study does. What could possibly be learned from this type of analysis? Taking an unexpected perspective often reaps rewards and benefits. Donald Super suggested that retirement is a stage of career development (Super, 1990) and this viewpoint captured my interest and lead to many questions. Furthermore, Super wrote about the importance of transitions from one stage to the next, and retirement is a transition. In today’s economic and socio-demographic reality, viewing retirement as another stage in career development makes sense. Career development across the life course has changed (Freeman, 1993; Super et al., 1996): Individuals generally have several careers throughout their lives. Older adults’ volunteer activities during their retirement years may take on a new meaning and importance in life as longevity increases: For some, it could be like a ‘second’ career.

Career development theory, middle aged and older adults, work and retirement.

Until recently, there has been little attention given not only to retirement paths, but to middle-aged and later-life career paths in the human resources and career development literature. Population aging has helped to generate new interest in this area.

Although career counselling professionals recognize the unique and dynamic process of career development during middle to later adulthood (Brewington & Nassar-McMillan, 2000; Simon & Osipow, 1996), the research literature has tended not to address this issue among this
particular age group, despite repeated calls to do so (Greller & Stoh, 1995; Kreps, 1971; Swanson, 1992; Tolbert, 1980). Kreps (1971) highlighted the need for research to examine the various career paths into retirement that help older adults better integrate work with other activities. She predicted that pre-retirees age 50 and older would be interested in options such as early retirement, phased retirement, and second careers. Greller and Simpson (1999) found that there is a growing body of literature addressing later life career development; however, it is located in a range of disciplines such as gerontology, sociology, social psychology, labour economics, career theory and human resource management. The field of gerontology has been examining retirement and the impact of aging on older workers for some time (Bee & Bjorklund, 2004; Hooyman & Kiyak, 2002). Due to the predicted impact of population aging on employment, benefits, and pensions, actuarial science has been examining this issue as well, as a scan of recent actuarial journal article titles indicates (Planet Now, 2007; SSRN, 2007).

Only in recent years have career development researchers begun examining the careers of older adults, with more articles covering development during the later portion of the life-span and addressing older people (Dagley & Salter, 2004). Collins (2003) recognized a shift in interest towards the later stages of adults’ careers, as the population ages. Other researchers have also found that current work in the field is beginning to recognize the career transitions of older people and how they move into later life career phases (Imel, 2003; Riverin-Simard, 2000).

Within this literature, some research has examined pathways into retirement. Hornstein (1985) examined the experiences of retirees as they anticipated and entered retirement. She found that retirement can be viewed in four unique ways: 1) as a transition into old age, 2) as a new beginning, 3) as a continuation of pre-retirement life structure, and 4) as an imposed
disruption. Greller and Simpson (1999) state that retirement can either be viewed as the end of career or as an integral part of it. The view that career can be integrated within retirement coincides with Robert Atchley’s continuity theory which posits that middle aged and older adults use continuity to preserve existing structures in retirement (Atchley, 1971; 1989; 1999). This also resonates with the life course perspective, which explains how past decisions and experiences influence present ones (Giele & Elder, 1998).

Harper and Shoffner (2004) argue that work adjustment theory is useful in the career counselling process when assisting retirees who want to continue working after retirement because of financial needs or as a way to stay active. According to work adjustment theory, the objective for retirement is for the older person to feel a level of career-environment correspondence during retirement that is similar to that experienced before retirement (Harper and Shoffner, 2004). Individuals are encouraged to seek out elements of their career-environment that were lost due to retirement and find replacements. This is facilitated by an exploration of skills, abilities, values, needs, personality and levels of past career satisfaction. Through this exploration, older adults develop a new individual-environment correspondence. This model enables individuals to develop a new career plan where they can use similar skills and abilities to those in their previous career; hence, it relates to life-span, life-space theory (Super et al., 1996) as well as to the life course perspective (Giele & Elder, 1998).

While previous research has touched on retirement and the transition into retirement, it can be better integrated into pre-retirement career and life structure and, therefore, should be incorporated into theories of career development. This study begins to explore this possibility. The life-span, life-space theory of career development (Super et al., 1996) is important because it encompasses and describes the middle and later career stages, recognizing retirement as a
significant career event. This theory is the primary interpretive framework for this study. This section will present Super’s theory including its key concepts and why it was chosen for this study. It will also explore the history of this theory, its criticisms, and several key ideas within this theory including the career stages and the developmental focus of the theory, the Disengagement stage, self-concept, life roles and role salience. Throughout this discussion on Super’s theory, the literature on volunteering during retirement will be examined. One goal of this study is to build upon Super’s theory and to determine whether volunteer work undertaken by adults retired from paid jobs can be viewed as an additional career stage.

**Donald Super’s Life-Span, Life-Space Theory of Career Development**

Donald Super’s life-span, life-space theory of career development (Super et al., 1996) explains the progression of individuals’ careers across their life course, from their entrance into the workforce until their retirement, and it is helpful for understanding vocational development and organizing career education and counseling. Super’s theory can be described as a developmental self-concept theory of careers which evolved over a period of more than fifty years through careful and systematic testing by applying theory to practice and using the results to refine the theory and to develop interventions for practitioners (Bingham, 2001; Chen, 2007; Osborne, Brown, Niles & Miner, 1997; Super, 1942, 1951, 1953).

**Historical background.** Donald E. Super’s academic career spanned more than 50 years before his death in 1994 (Herr, 1997; Savickas, 1995; Super, 1942, 1951, 1953). Super led the development of the life-span, life-space theory of career development (Super et al., 1996) and constructed a comprehensive framework through which career counsellors and vocational psychologists can examine careers (Savickas, 1995). Super was one of the world’s leading experts in career development (Bingham, 2001) and he described occupational choice as a
developmental, unfolding process, not a one point-in-time event (Super et al., 1996). He stated that career development takes place through an interactive process between an individual and her environment (Freeman, 1993; Super, 1990). This theory resonates with the life course perspective from the field of gerontology, which will also be highlighted in this chapter. Super’s longitudinal view of careers was considered his single most important idea. Super’s theory emphasizes continuity in human development over the entire life cycle.

**Criticisms.** Super et al.’s (1996) theory is a developmental stage theory and therefore the theory has the drawbacks that are inherent in all stage theories: the focus is on the stages and their associated developmental milestones, and these are predetermined, apply to everyone, and are age-graded, neglecting social class, race, gender and cultural variability (Freeman, 1993). However, this theory has been used successfully in other countries and among different ethno-cultural groups to assist with the career development of youth and young adults (Freeman, 1993).

Stage theories also tend to ignore the broader social picture. Super et al. (1996) incorporate some sociological factors into this theory and somewhat avoid this pitfall, although this theory is not as broadly applicable as the life course perspective is. The life course perspective provides further insight with retirees and the general population; it is used to examine development and the lives of individuals with more depth because the life course includes life stages that are embedded within social institutions and history (Elder & Johnson, 2003; Elder, Johnson & Crosnoe, 2004). The idea that the concept of life course captures development that is embedded in space and time is what proponents of the life course perspective view as the key difference between the concepts of life course and life-span (Elder, Johnson & Crosnoe, 2004). In addition, Super et al.’s theory was designed to focus on career
development and the worker role, whereas the life course perspective was designed to examine all life roles and human development more broadly.

Super was criticized for modifying his theory several times (Bingham, 2001; Freeman, 1993; Scott, 2006), and even changing its name several times (Savickas, 1997); however, Blustein (1997) and Savicaks (1997) commended Super for adapting his theory as new research was conducted and his insight into career development was refined.

Super stated that his theory is not integrated but is rather segmented (Freeman, 1993; Herr, 1997). Some researchers have called his theory fragmented (Freeman, 1993). It is uncertain whether this is a criticism of the many different concepts within this theory, making it a somewhat complex approach, or the fact that the theory incorporates stages, which are viewed as separate and age-graded.

Super was also criticized for applying his theory to women and their careers when it had been developed on young men. He argued that the pattern of women’s careers, which he based on men’s careers, has been supported in several studies (Freeman, 1993). The stages he outlined may not be as well delineated in the careers of some women and men, because females and males both recycle, and go through mini-stages, making the boundaries of the stages blurred at times. Further, it is important to examine the situational or environmental determinants that influence career, and this is what many researchers have focused on while investigating women’s careers (Freeman, 1993).

Despite the changes in the world of work during the last decades, Super’s theory is still applicable in contemporary society (Freeman 1993, Super et al., 1996). Overall, Super’s theory has been very influential in the field, and it continues to be used in research and in practice for career development and career counselling. Adaptations and modifications can be made to this
theory, just as Super modified his theory over time to reflect changes in society and the evolution of the theory through empirical data (Super, 1957; Super et al., 1996).

Why Use Super’s Theory?

Super et al.’s (1996) theory was chosen for many reasons as the primary interpretive framework that shaped the research questions in this study: 1) It is recognized by many as the most comprehensive theory in the career development field, and it is holistic and humanistic. 2) It incorporates the ideas of personal and career development, enabling a dual view of development. 3) It recognizes transitions across the life course during the rainbow of life (see Figure 3.1), and, even more so, acknowledges that retirement is an important part of career development. Thus, it incorporates key aspects of the life course perspective. 4) It facilitates an examination of continuities and connections within the life roles of worker and volunteer. 5) In addition, the theory integrates ideas from several fields or disciplines including psychology, sociology and career development. This theory brings together life-stage psychology and social role theory from the fields of psychology and sociology respectively. Overall, Super’s theory provides insight into older adults’ career trajectory during their retirement as they engage in volunteer activities.

The Career Stages and Career Development.

Super’s theory explains how careers develop and considering development over time was important in his theory (Super et al., 1996). Super said:

It has always seemed important to maintain three time perspectives: the past, from which one has come; the present, in which one currently functions; and the future, toward which one is moving. All three are of indisputable importance, for the past shapes the present and the present is the basis for the future. (Super, 1990; p. 197)
The idea that career development is a process that takes place throughout life fits nicely with the life course perspective, a gerontology framework that also outlines development across the life course and sees development as occurring within the societal context, combining ideas from psychology and sociology (Giele & Elder, 1998; Super et al., 1996). According to the life course perspective, it is important to recognize development as a lifelong process and to understand that what comes before impacts what happens subsequently. The life course perspective illustrates that there is continuity throughout life, such as from the beginning of career until the denouement of career and beyond.

Super and his colleagues (1996) outline five life stages of career development: Growth, Exploration, Establishment, Maintenance, and Disengagement (Super et al., 1996). Taking this long-term view of an individual’s development across life increases our understanding and insight when using these two perspectives together. Super’s theory is particularly interesting because of the ebb and flow of a life through various roles that are revealed in a portrait of an individual. His model portrays life as a rainbow to demonstrate this flow, as shown in Figure 3.1.

The stages of Super et al.’s (1996) theory are:

- **Growth**, where the tasks are a growing interest in the future, increasing control in life, achievement in school and developing competent work habits;

- **Exploration**, with the tasks of crystallizing a socially recognized vocation, specifying the choice of vocation/occupation, and implementing that choice through training and education;

- **Establishment**, with the associated tasks of stabilizing (involving workplace-focused orientation and socialization and satisfactory job performance), consolidating (of the position through positive work attitudes and relationships with coworkers, and productive habits) and advancement (of career);

- **Maintenance**, deciding to hold onto the position, updating skills and keeping up, and innovating (to develop new ways of doing tasks and discovering new challenges); and

- **Disengagement**, during which deceleration, retirement planning and retirement living occur.

Interestingly, Bejian and Salomone (1995) argue that a sixth stage, ‘career renewal’, should be added to Super’s theory between the Establishment and Maintenance life stages. These
researchers connect ‘career renewal’ to Erikson’s (Erikson, 1974) theory of psychosocial identity development and the stage of generativity versus stagnation, and suggest that the tasks or substages within this new life stage are career consolidation and generative care. These tasks are completed in order to avoid or deny stagnation. This focus or interest in generativity is important for middle-aged and older individuals as they turn away from individual pursuits and embrace community, civic or social endeavours – activities that benefit the broader society (Bradley, 2000; Erikson, Erikson & Kivnick, 1984). Later-life volunteering fulfills this need.

**The Disengagement life stage.** Disengagement, the focus of this study, is the last life stage and it describes the denouement of career with the associated transition into retirement (Super et al., 1996). This stage consists of the developmental tasks for retirement: deceleration, retirement planning and retirement living. Super et al. state that deceleration involves declining activity and turning over tasks to colleagues. Thinking about retirement and retirement planning become central activities, and leads to a separation from paid work. Super et al. state that during this stage, individuals experience a decline in energy and interest in their occupation. The final Disengagement task, retirement living, involves the development of a new lifestyle and life structure.

During the Exploration stage of career development theory, it is recognized that young people gain new skills and abilities through volunteering (Chappell & Prince, 1997; Handy et al., 2010; Hustinx, 2010). Young people try out different tasks and take on responsibilities through their volunteer activities. But Super (Super et al., 1996) does not comment on volunteering during Disengagement or specifically discuss the impact or the purpose of volunteering in adulthood, later life, or during the retirement years.
Recently, there have been serious criticisms of the Disengagement life stage and it appears this stage needs revision. Collins (2003) claims that life stages need to be extended because the concept of retirement has been in flux since life-span has expanded over time. Life-span, life-space theory uses age ranges to delineate the life stages (Collins, 2003; Sharf, 2006). However, with these increases in life expectancy, the age-grading does not reflect reality and needs to be reconsidered or adjusted, and therefore the life stages need adjustment and extension. Rising life expectancies can also place life roles in a new context, as there is more time to pursue various roles. In addition, Grelle & Simpson (1999) insist that changing demographics will necessitate the extension of careers and this will both impact the Disengagement stage and necessitate an adjustment and extension of life stages while advocating a systemic approach to career theory.

Further, Collins (2003) argues that the concept of retirement is outdated and needs to be renamed and redefined. He states that retirement policies will need to change because of people’s longer life expectancies and better health. There is also a need to examine the alternatives to standard retirement (Collins, 2003), such as part-time employment, phased retirement and volunteering as a second career.

Much research indicates that retirement is changing. In their review, Hansson, DeKoekkoek, Neece, and Patterson (1997) found that there were many paths to retirement. Sterns and Miklos’ (1995) research indicates today’s older adults opt for different career paths during their later years. Some choose to remain in the paid work force, while others decide to fully retire. Sterns and Miklos (1995) stated that a life-span approach best enables individual differences in career paths. McDonald (2006) found that both men and women are embracing a
‘new retirement’, where retirement is no longer structured and confined to a single retirement age and it is a dynamic ever-changing process.

A rethinking of the concept of retirement to encompass ‘second careers’ in paid or unpaid work will meet the needs of both society and older workers who want to remain engaged and do not see themselves as disengaging during their later years (Collins, 2003). Such a radical change will obviously impact the Disengagement life stage of Super’s theory and this stage will need to be re-examined and augmented in order to reflect the realities of today’s older workers.

**Life roles and role salience.** Super’s theory explains that individuals hold one of six life roles (Super et al., 1996). These are: child, student, leisurite, citizen, worker and homemaker. The latter five roles are sometimes referred to as the primary roles (Niles, 2001). Subsequently, the roles of spouse and parent were added to the model, and the role of child was further refined to include being a son or daughter (Super, 1980). A further addition to the model is the role of pensioner (Herr, 1997; Super, 1980); however, in this study, retiree is the term chosen for this role, rather than pensioner. In addition, in this study all the family roles are combined and called ‘family role’ that represents the multiple roles of being a family member. The role of citizen is expressed through volunteering, for example, participating in community service in social, recreational, arts and cultural, political or religious organizations. Through the role of citizen, Super et al. highlighted the importance, for individuals, of volunteering. The role of student is present throughout life, demonstrating the importance of not only formal learning but also informal learning and lifelong learning. In this study, the role of student is referred to as the learner role.

Life roles are the embodiment of life-space within this theory. Super et al.’s (1996) identification of the roles of citizen and student are particularly important for this research.
Super’s life rainbow demonstrates that individuals may volunteer at different times during their lives, and this includes during the later years of life. Likewise, individuals may be learning at different times during their lives.

Super (1990) envisioned an ever-changing dynamic of life roles across the life course and this is the reality for older workers today. People between the ages of 55 and 74 tend to reduce or stop their involvement in paid work, not always by choice, and relinquish some of their family roles (Mutchler, Burr & Caro, 2003). Mutchler and her colleagues (2003) longitudinally followed participants aged 55 to 74 to examine their engagement in volunteer roles while having different work statuses. They found that full-time workers were less likely than those in other work statuses to volunteer. Part-time workers are more likely than full-time workers to formally volunteer and those who had work stoppages were also more likely than full-time workers to volunteer. In addition, these researchers found continuity in volunteer behaviour, where individuals who tended to volunteer in the past continue to volunteer, with paid work status having little effect. Individuals who had not been volunteering previously and were part-time workers tended to be significantly more involved in formal volunteer activities than were full-time employed workers. These last two findings indicate past experiences influence present ones and show that examining volunteer experiences from the life course perspective is important for future research.

Some previous research has only focused on men; other research has focused exclusively on women. An examination of gender differences and similarities is important for this study. Price (2000) discovered that the women in her qualitative study did not find that the initial loss of the worker role psychologically very difficult and she speculated that this was perhaps because women experience so many transitions throughout their work and family lives. This
finding was in contrast to the experiences of men reported in the literature and also contrary to the predictions of role theory, which Price used as a theoretical framework for her study. Price (2000) stated that her participants substituted the role of volunteer for the professional role from which they retired.

The idea of role salience is important in life-span, life-space theory (Super, 1990; Super et al., 2006), and it is suggested that individuals differ regarding the importance that they assign to work in their lives. In addition, work can become more or less important during different periods in an individual’s life. Other roles can also vary in importance over time. Pogson, Cober, Doverspike, and Rogers (2003) found that the importance placed on leisure decreased with career advancement. This is characteristic of people with a strong work ethic who place great importance on the worker role. Future research should examine if these people ever do retire formally from their paid jobs and pursue other activities and how role salience is related to career self-concept.

**Transitions.** Career transitions involve the process of moving from one stage to another within career stage theory (Super et al., 1996). A transition occurs between the stages, and, presumably, after Disengagement there is a transition into retirement living, but this was not explored by Super et al. because this stage was not the focus of his research; however, some research that is applicable to this study has been conducted on the transition to retirement.

There are many types of transitions: smooth or disruptive, and normative (anticipated and voluntary) or non-normative (unanticipated and generally involuntary) (Baltes, Reese, & Lipsett, 1980; Elder et al., 2004; Holmes & Rahe, 1967; Super et al., 1996). One example of a normative event is the loss of the worker role when moving from a job or occupation into retirement. This
occurs during Super et al.’s (1996) Disengagement stage. A non-normative or unanticipated event can be traumatic and is more likely to become a crisis.

The concept of a normative event is discussed by Greller and Stoh (1995) in their exploration of the issues facing workers during mid and later life. Their review of the literature indicates that retirement is viewed as inevitable and appropriate for older workers. It is seen as a transition that will require minimal adaptation. More recent literature indicates that retirement is not inevitable because retirees are embracing multiple career paths in their later years and mandatory retirement legislation has or is being lifted in different jurisdictions (Hansson et al., 1997; McDonald, 2006; Sterns & Miklos, 1995).

The concepts of voluntary and involuntary transitions are evident in research by Schultz, Morton and Weckerle (1998) who examined push and pull factors on the decision to retire and the adjustment of early retirees. These are contextual issues. Push factors are viewed as negative elements such as poor health, or a dislike of the job. Pull factors, such as the desire to pursue leisure or volunteer activities, are positive considerations. The involuntary retirees felt that poor health was the most influential factor in their decision to retire. The voluntary retirees decided to retire because they wanted to do other things. After retirement, they felt it was important to relax, and enjoy feeling a lack of pressure. The voluntary retirees reported higher levels of satisfaction, self-rated physical and emotional health, and lower depression levels than the involuntary retirees. Pre-retirement, the voluntary retirees also planned for, discussed and thought more about retirement. While these factors may influence retirement activities and career self-concept, capturing voluntary and involuntary retirement is beyond the scope of this study.

**Skills, abilities and interests.** In the practical application of Super’s theory to the career development of young people, skills, values and interest inventories are critical tools because
these help to assess occupational interests and options. Skills, abilities and interests can be
developed through non-paid work such as volunteering and leisure, as these pursuits are
intertwined with work and are part of the career development process (McDaniels, 1984;
Watkins & Subich, 1995). In fact, McDaniels’ (1984) model states: career is equal to leisure plus
work, and he argues that leisure and work combine to build career. Non-paid activities such as
volunteering can also develop skills, abilities and interests in older adults. If new skills, abilities
and interests are being developed, this would equate with learning and personal development and
would mean that the learner role was becoming more prominent.

An interesting question is whether this process is influenced by gender. An examination
of the skills and abilities transferred from paid work to volunteer activities with a focus on
gender has been neglected in previous research and needs to be addressed.

In life-span, life-space theory, values, skills, interests, and abilities/capabilities are
important because these concepts can all be applied to older adults and the transition they
experience as they move from paid work to retirement and pursue volunteering. Because of their
importance within career development, skills and abilities are integral to the development of
research questions in this study.

**Self-concept.** Self-concept is central to Super’s theory and the self-concept refers to a set
of concepts that individuals have about their physical, psychological, and social attributes (Super
et al., 1996). In Super’s theory, the choice of skills, abilities and interests and the outcomes of
those choices that lead the selection of an occupation or career come from conceptions about the
self. Super discusses an objective vocational identity and a subjective occupational or career self-
concept. According to Super et al. (1996), self-concepts account for individuals’ subjective
views of their careers, or the “I”. The self-concept involves individuals’ perceptions of who they
are, including their evaluations of abilities, competencies, successes, and failures. Conceptions of the self also supplement objective views of their occupational interests, talents and values; this objective view is the vocational identity and is known as the “me”. Super et al. state that vocational identity is the possession of a stable image of goals, interests and goals. This also includes others’ conceptions of an individual’s self, based on the feedback an individual receives.

**Self concept system.** Super’s theory recognized that there is no one self-concept, but rather a collection of multiple self-concepts (Freeman, 1993; Super et al., 1996). Individuals have a constellation of self-concepts and the self-concept system is “the picture the person has of self in numerous roles and situations” (p. 141). The self-concept system is general or broad and integrated and within this, individuals have more specific and limited concepts of the self in different roles in society. Super et al. (1996) states that the self-concept and the self-concept system are useful for helping individuals understand and interpret their life roles and developmental status.

Super et al. (1996) indicate that self-concepts become increasingly stable between adolescence and late maturity. The majority of research on this topic looks at the self-concepts of young people and the development of their self-perceptions and self-knowledge about vocation, occupation and career as they enter the workforce and build a career. Career self-concept and this process are applicable to older adults as well. How do older adults’ career self-concepts change as they enter retirement and develop or further develop volunteer pursuits?

**Identity.** This study does not seek to examine identity per se; however, self-concepts and identity are interrelated and Super et al. (1996) highlighted this fact. Identity has been examined in the retirement, career development, unpaid work and volunteer fields within the literature.
McDaniels (1984) recognizes the role of unpaid work activities within identity because these activities are critical to the development of a strong concept of identity through the provision of opportunities for personal accomplishment. In addition, these activities also assist with maintaining social interaction through the formation of personal contacts.

Price’s (2003) study adds insight to McDaniels’ (1984) ideas. Price’s participants reported missing being challenged by their professions. They believed they lacked goals and direction, they felt the need to be productive in retirement, and many of the women wanted to contribute to society and to their community. In addition, all fourteen of the women in Price’s study were heavily involved in volunteering in their communities. All the women took on roles that were extensions of their former professional lives. According to Price, these women adopted volunteer roles that used their work skills and made them feel productive. Some of the women were so involved in volunteering that they had little time for themselves or for personal leisure activities. Price (2000) suggests that they may have responded to the loss of professional work challenges by looking for new sources of success and accomplishment through volunteer activities. Through the lens of Super et al.’s (1996) theory, these women wanted to use their pre-retirement skills and abilities, and there seemed to be identity fulfillment that these women gained through volunteering.

Another study examined career development and the last stage of Erikson’s (1974) psychosocial identity theory, integrity versus despair. Reis and Pushkar Gold (1993) state that retirement is a later-life opportunity for self-development and life satisfaction. The search for meaning and purpose becomes critical, as well as gaining the emotional understanding that life events have unfolded with meaning and purpose. Here, retirement activities and second-career activities are chosen to enable this search. These researchers also see connections to Super et
al.’s (1996) theory and argue that retirement counsellors can benefit from using this career development theory to examine the continuity and stability of behaviours. For example, Super’s theory can be used to examine the transferable skills which may be important in retirees’ activities and these in turn may provide life satisfaction.

Taylor Carter and Cook (1995) described the concept of retirement self-efficacy or the belief that one possesses the knowledge and skill needed to effectively negotiate retirement. In their review of relevant literature, they found that the transition to retirement is influenced by locus of control and retirement self-efficacy, and by social and work roles. Further, self-efficacy was an important determinant of both anticipated and experienced retirement satisfaction. Social roles not only provided a sense of identity but also offered social support, which in turn can buffer against stress. A further exploration of identity and self-concept research outside of Super’s et al.’s theory follows at the end of this chapter.

**Additional key concepts within Super’s theory.** Super et al. (1996) discuss several other key concepts in this theory: role interaction, life redesign and recycling. The life roles interrelate in different ways, creating role interaction, and Super et al. describe these interactions as conflicting, “minimal, and supportive, supplementary, compensatory, or neutral” (p. 129).

Life redesign is where life structures are implemented and stabilized as the developmental tasks in each life stage are achieved (Super et al., 1996). Life redesign can be planned and predictable, unique, and developmental or traumatic and unwanted. Life redesign can also be on or off time, to borrow a concept from the life course perspective: the life stages and tasks can occur at a similar time among peers, so that it becomes more likely, predictable and even expected at certain ages, by individuals and the larger society.
Individuals recycle through the stages at different career points and explore new career paths (Super et al., 1996). Furthermore, each life stage itself involves re-exploration and re-establishment, where individuals in a new stage usually recycle back through the stages in a mini-cycle. The mini-cycle tasks for older adults during the retirement stage are: reducing work hours, keeping up with what is still enjoyed, pursuing activities that have been neglected, put aside or postponed, finding a good location for retirement, and developing non-occupational roles (Super et al., 1996).

In his study, Price (2002) found that some early retirees become heavily involved in voluntary associations, sometimes approaching them as second careers. Price (2002) explains that these older adults have the time to donate to civic engagement because they are retired and are enjoying a long life expectancy. Applying Super’s (Super et al., 1996) theory to this type of volunteer career, they could be viewed as recycling into volunteering. The findings of this study leads to an important question: How many retirees appear to be treating their volunteering as a second career?

As mentioned previously, research on volunteering during retirement comes from multiple disciplines. The interdisciplinary nature of research on this topic connects well to Super et al.’s (1996) theory because they both integrate ideas from several fields or disciplines. Super et al.’s work integrates ideas from psychology, sociology and career development. A review of the literature reinforces the key concepts from life-span, life-space theory as being critical for this study. Career self-concept, life roles, role salience, abilities, skills, recycling and transitions are all critical for volunteering during retirement. However, Disengagement needs re-examination and revision; with demographic and social changes surrounding retirement, there is a need to re-examine career development theory and better integrate retirement into this theory.
**Exploring identity and self-concept.** Other researchers have defined identity as a combination of personal identity and social identity, where personal identity is a person’s self-perceptions and self-evaluations (self-concept), and social identity refers to how a person is viewed by others (Laliberte-Rudman, 2002). Identity can also be seen as a set of shared symbols that one attributes to oneself in a role (Reitzes & Mutran, 2006). Super’s conceptions about the self evolved over time and led to the refinement of his theory, and the self-concept system was developed as part of a later version of Super’s theory (Super, 1957; Super, 1990; Super et al., 1996). As previously stated, Super et al. (1996) view vocational identity as the objective self or ‘me’. There are multiple self-concepts, and vocational identity and career self-concept are smaller parts of the self-concept system. Finally, these multiple self-concepts are dynamic and change over time.

**Some Research on the Self.** Some research has examined adult ‘selfhood’ development or retirement and the self. Research supports the idea that conceptions about the self are dynamic. As milestones are met during the life course, new roles are added and these are incorporated into identity (Taylor Carter & Cook, 1995). Individuals play an active role in constructing the meaning and implications of their life experiences, in integrating new aspects of the self and in comparing new experiences with the past to create a coherent sense of self (Holahan, 2003). Past research has indicated that midlife and later-life are important periods for the reassessment, revisiting and integration of previous life experiences. This is evident through both Levinson’s (1978) theory of the life cycle as well as in Erik Erikson’s (1974) theory of psychosocial identity. Research indicates that this reassessment of self-concept occurs in both men and women (Holahan, 2003).
Retirement leads to developmental and social psychological transformations in self-concept, expectations, preferences and meaning (Moen, 1996). Changes in social behaviour and in cognitive responses are related to choices and to features of the contextual environment that shape those choices. Retiring from work can lead to loss of identity, uncertainty and stress (Gallagher, 2007). This is because work plays such an important role people’s lives, and is critical in the shaping of identity throughout the life-span (Nuttman-Shwartz, 2007). This has been the case particularly for men for whom work has historically been the principal source of identity (Moen, 1996).

Examining the self and selfhood in the literature is challenging because different researchers and various fields define and view it differently. Each study below is described using the terms identity or self-concept following the usage of the study’s researcher or researchers.

Price (2000) explored multiple elements of identity among 14 retired professional women who were volunteering. The participants reported that their loss of professional identity was significant: Their professional work had been a source of fulfillment and they had invested 10 or more years in their careers. However, they did not report an impact on their self-esteem or their personal self, and given their strong professional identification, this was a surprising finding. This does provide support for Super et al.’s (1996) idea of multiple self-concepts, consisting of the career self-concept and other self-concepts. These women had a professional self-concept and a personal self-concept, made up of many dimensions. How does career self-concept change psychologically when individuals move from paid work into volunteer work? This question has not been adequately addressed and will be explored in this study.

Erikson, Erikson and Kivnik (1986) mentioned several avenues for maintaining vital involvement: establishing social contact with coworkers, devoting time to family and friends,
and caring for one’s home; however, retirees may require more vital involvement over time than these avenues allow. Erikson et al. suggested that individuals who plan and appraise their capabilities can find fulfilling and creative outlets and perhaps develop a new career self-concept. Possible career paths included paid work or volunteering. However, these researchers stated that career development options may be limited by societal stereotypes and the age discrimination of older adults.

Reitzes and Mutran (2006) investigated retirement adjustment and self-esteem through a quantitative analysis of men and women working full-time and followed them until two years after retirement. While men and women had diverse life experiences before retirement, there were no differences in their self-concepts, identities or retirement adjustment. Pre-retirement worker identity influenced self-esteem both one and two years later. In addition, this study highlighted the importance of examining multiple aspects of self-concept.

Labiberte-Rudman (2002) conducted a secondary data analysis on 3 studies to examine the relationship between occupation, broadly defined by everyday tasks and activities, and identity among men and women. For some of the participants, their occupations were volunteer activities. The findings indicate that occupation influences sense of personal and social identity, and preferences regarding social identity influence choice of occupation. These findings can be further examined regarding volunteering: does volunteering influence career self-concept, and does career self-concept influence the volunteer choices that are made? The individuals in this study made occupational choices that allowed them to maintain an acceptable sense of personal identity. They demonstrated a desire to maintain a continuity of identity which enabled them to maintain a sense of being the same person as earlier in life. The seniors in this study provided many examples of activities, interests, and skills that they saw as being continuous over time and
as reflective of their identity. This last finding demonstrates the link between the key concepts of skills/abilities and self-concept in Super et al.’s (1996) theory and highlights the importance of taking a life course approach. Identity and self-concept during the transition from paid career into retirement and volunteering needs further study.

**Summary**

Donald Super’s life-span, life-space theory of career development recognizes transitions and changes within different contexts across the life-span. While Super’s theory suggests that retirement is a phase of one’s career path (Super, 1990; Super, Savickas, & Super, 1996), there is little research that actually examines this and explores key concepts of this theory and how they relate to recent retirees who are involved in volunteer activities. Questions remain about volunteering among older adults, the skills and abilities that they wish to use, how these relate to their paid work experiences pre-retirement, and how their career self concept changes as they adjust from being a paid worker to a volunteer in society. Retirement needs to be better incorporated into life-span, life-space career development theory.

**Super’s Theory and the Research Questions**

This study builds upon and expands previous research examining volunteering during retirement (Jonsson, et al, 2001; Kaskie et al., 2008; Moen & Fields, 2002; Price, 2002) to better understand retirees’ volunteer experiences, motivations and needs. According to the life-span, life-space theory of career development (Super et al., 1996), work and life satisfaction depend on the extent to which individuals find outlets for their skills, abilities, values, and self-concepts. During the transition to retirement, finding an outlet for talent is critical, and volunteering can fulfill this need. People choose their volunteer activities and life-span, life-space theory indicates that life roles, transitions, skills and interests, the career self-concept and the self-concept system
are important concepts which should be explored in retirees’ volunteer experiences. These key concepts, in addition to the literature and theoretical reviews in chapters 2 and 3, assisted in developing the research questions that are outlined in Chapter 4.

There were two additional theoretical perspectives used in this study which were critical to this research. This study is interdisciplinary in nature, and these perspectives provided valuable insights into the research findings. The two theories are the life course perspective and the dimensions of learning. Life-span, life-space career development theory identifies the role of student or learner, but does not present the learning processes or ways of understanding learning, and a theory on learning was required. In addition, although life-span, life-space career development theory takes a life-span view, it does not fully articulate the broad-based perspective provided by life course theory that enables an examination of retirees within the community and societal context that is necessary is in this study; therefore, the life course perspective is the focus of the next section.

The Life Course Perspective

This study uses the life course perspective as an overarching framework for understanding development on multiple dimensions during the middle to later years of life (Elder & Johnson, 2003; Giele & Elder, 1998). The life course perspective was developed over several decades using longitudinal research, and combines sociological and psychological approaches in order to understand development, change and transitions within the ever-changing historical, social and biographical context (Elder et al., 2004).

The life course perspective is the dominant theory in gerontology. This perspective indicates that development is contextual and multifaceted; it examines life events and transitions, and states that researchers should take a long-term view of behaviour rather than focusing on one
point in time (Giele & Elder, 1998; Hutchison, 2003). The life course perspective emphasizes process, and the characteristics of individuals and environments that promote development throughout the life course (Moen, 1996). From a life course perspective, volunteering during retirement is not only a transition but also a culmination of decisions made, paths taken and not taken, and the individual, social and historical circumstances during a person’s life (Connidis, 2001; Elder & Johnson, 2003). With an emphasis on social and temporal embeddedness (Moen, 1996), this perspective situates volunteering during retirement within the framework of prior occupational trajectory, current and on-going needs and opportunities, structural imperatives such as corporate and government policies, and the cohort one is born into.

This paradigm brings four key elements into focus when investigating phenomena: development of the individual (human agency); the linking of lives through common expectations, norms, social and cultural expectations and among social institutions (social integration); the individual’s location in time and place (both the general and unique cultural and historical factors); and the timing of lives (the intersection of age, period and cohort) (Elder & Johnson, 2003; Giele & Elder, 1998). From the life course perspective, some or all of the four key elements can influence development and change. The timing of lives is the funnel that brings the first three key elements together and influences adaptation to situations and events, leading to the different trajectories that individuals take across the life course.

**Retirement from a life course perspective**

Retirement can be viewed through the life course perspective. Individuals on the cusp of retirement and retirees both use human agency to set goals and objectives for this time in their lives (Giele & Elder, 1998). They actively make decisions and organize their lives around these goals. Individuals construct their own life course through the decisions, paths and choices they
take within the opportunities and constraints of their circumstances (Elder & Johnson, 2003). For older adults, retirement may not be exactly as they intended, anticipated or expected; however, unless there were unanticipated events, they have some control in shaping their retirement activities and lifestyle (Chen, 2006; Jonsson et al., 2001; Moen, 1996; Marshall, 2005; Nimrod & Kleiber, 2007).

The concept of linked lives is critical to this paradigm (Elder, Johnson & Crosnoe, 2004; Giele & Elder, 1998). Linked lives highlight how all levels of social action interact and mutually influence each other as parts of a whole and through interaction with other people who share similar experiences. This can be viewed through demographic changes in the proportion of older adults in society, changes in government and employer policy regarding retirement, and changes in government policy and legislation affecting nonprofit organizations. These structural changes can impact commonly held norms and expectations held in society (Giele & Elder, 1998) regarding retirement and retirement activities and thereby lead to changes in retirement patterns, changes in career trajectories, and changes in retirement pursuits.

Individuals’ historic and cultural location in time and place influence the type of retirement experienced (Elder & Johnson, 2003; Giele & Elder, 1998). The transition to retirement 25 years ago would be much different than the transition experienced by someone today. Finally, the timing of lives and age, period and cohort effects come to bear on the baby boomer cohort in particular because it is a large cohort that is currently on the cusp of retirement (Statistics Canada, 2007a).

Other important concepts in the life course perspective are the ideas of age norms in development and the longitudinal trajectory connecting roles and events in a person’s life over time (Giele & Elder, 1998). Retirement is a time of transition and is a pivotal period and must be
seen in relation to past activities during a life time (McDonald, 2006).

The life course perspective is also insightful for viewing volunteering during the retirement years. This paradigm highlights the structural changes (Giele & Elder, 1998) such as demographic changes with population aging, and changes in government legislation and funding that affect both nonprofit organizations and the individual’s life trajectory. These are changes that can influence volunteering. The influence of the concept of linked lives on volunteering is evident from recent research that found non-volunteers who marry a volunteer are 16% more likely to begin volunteering (Butrica, Johnson & Zedlewski, 2007), parents who volunteer transmit volunteerism to children (Bekker, 2007), and family values influence social responsibility and volunteer behaviour (Harootyan & Vorek, 1994; Pancer & Pratt, 1999).

The life course perspective is used in the field of gerontology. Life-span, life-space theory of career development and the life course perspective view transitions and social contexts as being important for development. These theories are critical for interpreting the findings of this study.

**Lifelong Learning**

There are a number of models within the field of education that espouse lifelong learning and can be connected to this study of retirees who formally volunteer. Each model comes from a different area within the field of education.

This is a learning society and we are always learning (Jarvis, 2004). Adults are engaged in formal education in institutional settings, continuing education, informal education and informal learning in the community, and in self-directed or collective learning (Livingstone, 2008). Many of these learning contexts emphasize social learning and demonstrate the social embeddedness of learning (Illeris, 2007).
While formal education often first comes to mind when considering learning and much research has focused on this, there is a growing interest among researchers in lifelong learning and the field of lifelong learning has become increasingly important (Livingstone, 2008, 2010; National Board of Education, Stockholm, 2000), especially within our knowledge-based economy (Illeris, 2007).

Illeris (2004) describes an innate desire to learn. Females and males as well as adults and older adults, teenagers and children learn. Adults of all ages have lifelong learning needs for their own development and in order to be productive in society (Hoare, 2006; Illeris, 2004; Livingstone, 2008, 2010; Schugurensky et al., 2005); learning and cognitive stimulation are required throughout life. This reinforces Super et al.'s view the learner role is present throughout life.

Hoare (2006) indicates that learning spurs development. This pertains to formal and informal learning, as well as to learning about the self. Sinnott & Berlanstein (2006) state that there is a great need for connection to community and to other people, and this stimulates learning; however, for older adults, the end of worklife unbalances a very large social connection that they have had in the public sphere.

**Lifelong, Lifewide Learning**

Lifelong learning has been previously explained as learning across the life-span. Lifelong, lifewide learning examines learning within settings or multiple contexts across the life-span (National Board of Education, Stockholm, 2000); the full breath of learning within multiple learning contexts is encompassed within the term ‘lifewide’. While learning within formal education through the school system has been emphasized in the literature, informal learning occurs all the time within different social contexts and this involves learning from experiences
(Schugurensky, 2000). The context for learning can be the school, the workplace, the home, the nonprofit organization, or the broader community. Further, lifelong, lifewide learning highlights the fact that learning takes place in not only within multiple contexts, but also at all ages and throughout all stages of life.

**Informal Learning and Volunteering**

As mentioned earlier, self-directed informal learning often takes place through volunteering (Livingstone, 2008) and little research has examined this (Duguid, Slade, & Schugurensky, 2006; Schugurensky, 2000). Schugurensky (2000) classified informal learning along the dimensions of intention (or planning) and awareness (or consciousness) that individuals put into their learning experiences at the time of their learning and developed three categories of informal learning: self-directed, incidental and socialization. Self-directed learning is intentional and conscious and is undertaken by an individual alone or as part of a group, without the assistance of an instructor. Incidental learning is conscious but not intentional. It occurs when there is no prior intention to learn something from an experience, but afterward it is clear that learning has taken place. Finally, socialization involves acquiring values, attitudes and behaviours through everyday life and this type of learning is unplanned and unintentional.

Informal learning experiences are often unconscious and unplanned or unintentional and the skills, attitudes that are derived from these experiences are tacit learning (Schugurensky & Myers, 2003). Schugurensky and Myers state that this unconscious and unplanned learning might be difficult to recall or to articulate. While self-directed and intentional learning are both purposeful, in this model it is unclear whether the distinctions between intention and awareness depend on the learner who is participating in the learning experience and her goals and
objectives. Furthermore, social learning though interactions is common and other actors might be involved in the learning, thus influencing the content and shape of the learning.

**The Dimensions of Learning**

Knud Illeris (2004) states that learning is an essential part of human life. According to Illeris, learning is an innate skill, and the desire to learn is inherent in individuals. It is important to state that this desire to learn is inherent in individuals of all ages, across the life course.

In an attempt to develop a comprehensive learning theory that addresses the whole person, Illeris (2004) posited the theory on the three dimensions of learning. His theory describes the dimensions, the processes that occur within them during learning and their interactions with each other. According to Illeris, a learning triangle model best describes the fundamental processes of learning, consisting of three dimensions: cognitive (knowledge and ability), psychological (emotion and motive) and social (interaction and integration). The cognitive dimension involves the development of internal psychological schemes through a process of construction and reconstruction as new learning is related to previous learning. The development and acquisition of cognitive structures is an active process, and three types of processes come into play: Cumulative learning, assimilative learning and accommodative learning (Illeris, 2004, 2007).

The psychological dimension refers to the motivation for and the emotional commitment to learning. According to Illeris (2004), “there are always emotional tones or imprints attached to the knowledge being developed” (p. 73). Illeris expands on the connection of emotion and learning to state that learning is a desire and individuals have a desire for learning; the acquisition of knowledge and skills provides innate pleasure. He links this idea of desire to life fulfillment. Psychological aspects within the emotion surrounding learning include interest,
affective motivation and valuing of the learning, and these influence the cognitive learning. He states that “the dynamic in the learning processes emanates from the affective, emotional and motivational patterns – these provide psychological energy for learning.” (p. 74).

Humans are social beings, and learning is socially embedded. Hence learning requires interaction between internal cognitive and psychological processes, and social interaction processes between an individual and her material and the social environment, reflecting current social conditions or social markings (Illeris, 2004). Individual development takes place within the societal context and the “social-societal dimension is rooted in the social and societal contexts of which the individual forms a part” (p. 117). Social contexts are historic-societal in nature and everything individuals do is socially influenced. Illeris identifies four types of interaction that are significant for learning: perception, experience, imitation and participation, and discusses how these various types influence individual learning.

Illever’s (2004) theory connects learning to human development and sees the whole person. Illever discusses “the individual as a whole with all of its qualities, motives, skills and knowledge” (p. 87). Learning must be aimed or gauged to connect to an individual’s stage of development. Further, he perceives linkages between learning, development and personality characteristics, and thus in uniting these concepts, his learning theory connects to Super’s (1996) theory of career development. This holistic approach is one benefit of his theory. The other key advantages of his theory are the inter-connectedness of the three dimensions and the recognition that they are dynamic and not always perfectly balanced.

Illever’s (2004) model could be enhanced by further elaborating on the relationship between learning and development among adults. Illever goes into detail for the three dimensions
of learning regarding children, but does not devote as much attention to adulthood and how learning and development differ for older age groups.

In an effort to understand the person as a whole, Illeris’ (2004) theory on the dimensions of learning could be expanded upon and enhanced by adding two additional dimensions: physical and spiritual. In discussing other process models for viewing development throughout the life course and how these compare to his model, Illeris mentions that biological, cognitive, emotional and social dimensions could be included as they are independent and intertwined, and together reflect the life course of the individual. The physical or biological dimension is foundational for learning; however, Illeris drops this aspect of learning and uses the other three dimensions. Physical learning incorporates the whole person and includes kinaesthetic learning and embodied learning. Kinaesthetic learning is learning by doing something physically. Embodied learning involves the senses, perceptions, and mind-body action and reaction (Kerka, 2002). Through physical learning there is a physical sense of knowing and being or becoming. Spiritual learning includes an appreciation for spiritual or greater things (Hess, 2010) and the search for meaning in life. Through spiritual learning there is a connection to a greater purpose or a greater good (Shrivastava, 2010). Spiritual learning is connected to transformative learning (Hryniuk, 2010;

![Figure 3.2. The five dimensions of learning. Adapted from The three dimensions of learning, by K. Illeris, 2004. Copyright 2004 by the Krieger Publishing Company, Malabar, FL.](image-url)
The additional dimensions of physical and spiritual learning create a depth that not only goes beyond the traditional cognitive-focused learning, but beyond Illeris’s model as well (see Figure 3.2). For this study, I am adding these two dimensions to Illeris’s model.

My modified five-dimensional model is a more holistic and comprehensive approach to learning. This new model provides an in-depth look at learning and is illustrative for classifying and discussing the learning sought and encountered by the retirees who have accumulated a lifetime of experience and learning, and provides a greater understanding of these older adults.

**Summary**

To date, informal learning and volunteering has received little attention from researchers. As limited research has been conducted on this topic, the exploratory nature of this study is important. By examining informal learning among retirees during their volunteer activities a greater understanding of their openness to learning and their learning goals can be provided. Illeris’s (2004) theory of the dimensions of learning was discussed as the framework for understanding informal learning through volunteer activities. Illeris’s work provided further evidence of the connection between learning and development. The modified model with the five dimensions (physical, cognitive, psychological/emotional, spiritual and social) enhances Illeris’s work, better capturing the experiences of the retirees in this study.

**Conclusion**

Super et al.’s (1996) theory examines the career development of individuals across the life cycle. However, Super et al. focused on younger age groups. In addition, the stage of Disengagement, the transition into retirement and the retirement years have been neglected up to this point.
As the primary interpretive theory for this study, Super et al.’s (1996) life-span, life-space theory of career development can assist in understanding retirees’ volunteer experiences. Using this theory to examine the denouement of career provided insights on the volunteer activities of retirees. The Disengagement stage is a time when new pursuits can develop. Up until retirement, worklife makes up a large part of life, and while the end of worklife can be a predictable event prior to retirement, the fact that it can last for 25 years means that retirees must find other things to do with their discretionary time in order to age successfully. The role of worker is very central to many people and this study investigated the continuance of career and the transference of paid work into volunteer activities using Super et al.’s theory.
Chapter 4: Methodology

Mixed methods designs incorporate techniques from both the quantitative and qualitative research traditions yet combine them in unique ways to answer research questions that could not be answered in any other way....this combination (a whole or gestalt) is more than the sum of its qualitative or quantitative components. (Tashakkori & Teddlie, 2003, p. x).

This chapter consists of the following sections: a restatement of the research questions; the research design; participants and the recruitment process; ethical issues related to the recruitment; measures, including validity and reliability, data analysis procedures; and a summary.

Research Questions

My research is a mixed methods investigation that examines seven research questions. In Phase 1, the following five questions were examined:

The questions addressed in Phase 1 were:

1) Do retirees use the skills and abilities that they developed through their paid work experiences in their volunteer activities?

2) Do retirees use the knowledge that they developed through their paid work experiences in their volunteer activities?

3) Are the contexts of retirees’ paid work experiences and their volunteer activities similar?

4) What learning opportunities do retirees have through their volunteer activities?

5) Do retirees’ career self-concepts change through their volunteer activities from those they developed during their paid work careers?
The questions examined in Phase 2 included questions 1, 2, 3 and 5 above in addition to the questions outlined below:

6) What factors contribute to participants’ choice of activities?

7) Are retirees’ career self-concepts related to the utilization of skills, abilities and knowledge in their volunteer activities?

Finally, in Phase 2, research question 4 is modified and becomes:

4) What learning goals do retirees seek to fulfill through their volunteer work?

**Study Design**

The methodology used in this study was a mixed methods paradigm (Creswell, 1998) incorporating a broad survey with a large sample and the insights that come from in-depth interviews. Specifically, this methodology used a developmental mixed-methods research design that combined two phases involving in-depth interviews and a survey (Brewer & Hunter, 2006; Creswell & Plano Clark, 2007; Greene & Caracelli, 1997; Greene, Caracelli & Graham, 1989; Tashakkori & Teddlie, 2003). In Phase 1, semi-structured exploratory open-ended interviews with 12 retired male and female volunteers age 55 to 70 were used to identify key issues and develop a survey. The interview sample was selected through snowball sampling on the basis of convenience (Collins, Onwuegbuzie & Jiao, 2007).

In Phase 2, the survey, designed from the insights gained from Phase 1, was used to investigate the research questions, including two research questions that were generated from Phase 1. Prior to administration of the survey, the survey items, which were developed from the interviews, were shared and piloted with a focus group of 12 retirees who volunteer as well as with my thesis supervisor and thesis group. The survey of older volunteers was conducted using a sampling frame of nonprofit organizations. Nonprofit organizations were contacted through
Volunteer Canada’s network of community volunteer bureaus and nonprofit organizations across Canada, and to reach a few nonprofits where older volunteers might tend to be involved, Associations Canada (an on-line directory of about 20,000 listings of nonprofit organizations) was used. The target sample size was 100 survey participants.

The results of Phase 1 and Phase 2 were then integrated partially in Chapter 6 and to a greater extend in Chapter 7, the discussion chapter. The steps in the process are presented in Figure 4.1.

**Phase 1**
- Semi-structured Interviews with 12 Retirees who Volunteer
- Analysis and Quantitative Survey Instrument Development

**Phase 2**
- Pilots of the Survey and of the Career Self-Concept Instrument: Instrument Modification
- Quantitative Survey Conducted
- Survey Results Analysis
- Integration and Interpretation of Findings

*Figure 4.1. Research design.*

The rationale for this mixed methods developmental study design model is that the first phase informed the second one (Creswell & Plano Clark, 2007). The first phase explored the participants’ experiences, defined and expanded on key concepts in the research questions in order to understand retirees’ perspectives on these issues, and developed a common language for discussing these ideas. These qualitative interviews provided data to develop the large quantitative survey. The quantitative phase made it possible to address the research issues with a broader sample. Finally, the findings were integrated in part in Chapter 6 and more exhaustively in Chapter 7, with both phases leading to insights into volunteering among retirees and the transference of their paid work into their volunteer activities.
Participants and recruitment procedures. Participants in Phase 1 and Phase 2 were between 55 and 75 years of age, retired within ten years from when the data were collected, and were dedicated volunteers. Since previous research indicates that there is a trend towards leaving paid work and taking new employment, retirees who are ‘retired’ and working part-time were included in this study (Cahill et al., 2006).

Hall et al. (2006) found that the top one quarter of volunteers contributed, on average, 180 or more hours during the year, hence, additional criteria were that the participants in both phases of this study contributed at least three hours per week to their volunteer activities. Hall et al. (2009) reported that the average number of hours volunteered was 166 in 2007; however, the median was 56 hours, indicating that there is a small dedicated group who contribute a large number of volunteer hours and skew the average. In this study, the participants volunteered at a high level during the year. In other words, the study is based upon some of the most dedicated and the most serious of volunteers. The sampling frames from Associations Canada and Volunteer Canada assisted in recruiting survey participants who represent diverse occupational and cultural backgrounds in order to provide information on a wide range of skills, abilities, knowledge and types of learning.

As noted, the 12 participants in phase 1 were recruited through snowball sampling. These participants were viewed as key informants with important insights on the topic. Research questions one through five were investigated during these qualitative interviews. Two additional potential participants contacted me and were not included in Phase 1 because data saturation had been reached.

The survey sample consisted of 214 respondents from across Canada. Quebec nonprofits were not included in the call to participate due to limitations in funding and time for translation.
of the survey into French; however, a few participants from Quebec filled out the English survey. Older volunteers in Quebec may be a unique sample, but this study did not investigate this. Therefore, the survey findings must be interpreted with caution due to the lack of participation from the province of Quebec and the voluntary sampling frame that is not representative of the rest of Canada.

The quantitative survey was administered using Survey Wizard, an on-line survey tool, and distributed to nonprofit agencies in order to reach potential respondents. Paper copies of the survey were also made available. The characteristics of the participants in the study are discussed in chapters 5 and 6, depending upon which phase the participants are in.

**Ethical issues related to participation.** This research was conducted with human subjects in an ethical and professional manner according to Tri-Council Policy. Ethics proposals were submitted for each phase of this research. This study presented low risk for the participants, who were all adults who actively participated in their communities. The study’s purposed procedures were explained to the all the participants.

For both phases, all information that was collected was kept confidential. For Phase 1, identifying names were not recorded on transcripts and the information letter that participants read and kept a copy of is in Appendix A.

For Phase 2, both types of participants were able to keep a copy of the information letter (Appendices B and C) for their records (On-line respondents could print it out). Both on-line and paper survey participants received a consent form. On-line respondents consented to participate based on their willingness to fill out the on-line survey. For the paper survey participants, consent was at the bottom of the second page of their information letter. An email invitation to the survey was sent out using nonprofit organizations as the sampling frame. The email
explained the purpose of the survey and invited retirees who volunteer with nonprofit organizations to participate and fill out the survey. Screening information in the email further explained the criteria for inclusion in the study: individuals between the ages of 55 and 75, who have retired within the last 10 years and are committed volunteers providing 3 or more hours of volunteer activity each week. Potential participants were informed in the information letter that there were no reimbursements, remuneration or other compensation offered. They were informed that they could withdraw from the study at any time, and should they later decide not to participate, they could withdraw without consequence. Potential participants were informed that they might gain insights into their transition into retirement and the transference of their skills, abilities and knowledge from their careers to their volunteer activities and their sense of self. The email explained the hoped-for benefits of the study: gaining a better understanding of retirees’ volunteer and pre-retirement experiences to assist with recruitment and retention of volunteers while helping nonprofits to address and support retirees’ volunteer interests. The letter explained the plan for a longitudinal study on this topic and thus the necessity of keeping the data until 2013.

**Measures and Procedures**

**Development of the Phase 1 semi-structured interview protocol.** The interview protocol is attached in Appendix D. Items tapping each of the five research questions were incorporated into the interview guide and were based on a review of the literature. Designing questions that asked participants about their career self-concept and how it had changed were the most challenging, not only because answering such questions requires reflection and recollection but also because the transition and change in career self-concept occurs over time. Once a draft
protocol was developed and ethical approval was granted, two pilot interviews were conducted to assess the draft and any necessary changes were made.

In the Phase 1 interviews, open-ended questions were used as much as possible to build rapport with the participants. The open-ended questions also provided flexibility in the interview process and facilitated the development of questions that may not have been previously thought of (Knapp, 1997). The focus was on connections between paid work to volunteer activities and the transference of career self-concept from paid work to volunteer activities. The interview protocol consisted of nine sections:

1. Description of the participants self at this time
2. The transition into retirement
3. Description of pre-retirement or previous career/work
4. Details on volunteer history prior to now
5. Current volunteer information
6. Use of and transference of skills, abilities and knowledge
7. Learning opportunities
8. Changes in career self-concept
9. Volunteering as a ‘career transition’

The participants were asked to describe themselves and their transition into retirement at the beginning of the interview. Open-ended questions were used during the qualitative interviews, exploring the participants’ previous paid work including their skills, abilities and talents, their enjoyment of their paid work, the length of their retirement and of volunteering, their volunteer activities and the transference of their skills and abilities. Participants were informed of the nature of the research and at the end of the interview, they were asked whether
they felt their career self-concept had been transferred to their volunteer activities and whether they felt volunteering during retirement was a form of career transition. The participants were given informed consent forms, and the forms were explained to them. With each participant’s permission, the interviews were recorded using a recorder and I also took notes. Data collection was completed once there was evidence of data saturation. There were 12 interviews in this case study.

I conducted the interviews in person and they ranged from 45 minutes to three hours. Participants were asked how they would describe themselves to an interesting new acquaintance who they had just met. Questions in the interview tried to assess changes in self-concept over time by asking participants how much of their overall identity came from their position or career prior to their retirement. They were also asked how they were perceived by those around them, and they reflected on the process of retirement. They were asked whether they thought their skills and knowledge were transferred to their volunteer activities and whether they saw any changes in their sense of self during the transition to retirement. At the end of the interview, they were asked whether their volunteer activities were a form of career transition.

During the interview, participants were asked if there were memorabilia from their volunteer activities that they were willing to show me that illustrated their involvement and experience in volunteering. Several Phase 1 participants had photographs and newspaper clippings of their volunteer activities. A few participants spoke about thank you cards they had received from nonprofit organizations, but they had not kept them. These artefacts represented retirees’ volunteer involvement (Cole & Knowles, 2001), and they were an excellent way for the participants to show what they had been involved in. The artefacts were equally important for the generation of discussion.
**Phase 1: Semi-structured interview.** In Phase 1, the semi-structured interviews, data collection and the analysis of the transcripts were part of a flexible, dynamic and fluid process where the interviews were integrated with the analysis rather than being a separate activity (Merriam, 1988). The transcripts were selectively transcribed, focusing on the research questions. A journal was kept to track ideas and decisions made along the way in the research process. This was an important research tool.

The analysis in Phase 1 consisted of listening to the audiotapes and reading and re-reading the transcripts before considering categories for organizing key ideas. The data were examined using the theoretical lenses previously discussed in Chapter 3, in order to see which lenses fit best and then explore any resulting insights. Participants were consulted to receive feedback on the categories and findings and five participants agreed to a subsequent interview to further discuss themes. In the transcripts, quotes from the participants were highlighted and are incorporated throughout the results presented in Chapter 5, in order to better portray the participants’ experiences and the power of their stories. The data were coded by themes that were generated from the theoretical orientations.

At the conclusion of the data analysis of Phase 1, a quantitative survey instrument was developed. As mentioned, a focus group reviewed and made suggestions for the improvement of the survey questions before it was distributed. This group also provided feedback on the length of time it took to complete the survey. The focus group included four individuals who were in the original 12 case study participants.

An additional pilot study was conducted on the items in the career self-concept instrument. Details of this are outlined in Chapter 6 and in Appendices F, G and H.
**Phase 2: Survey instrument development.** In Phase 2 a survey was conducted across all provinces in Canada, except in Quebec because of the lack of time and funds to translate it into French. The survey instrument (see Appendix E) addressing the seven research questions was designed after data collection and analysis in Phase 1, to further explore these questions. Research questions six and seven, and the modified question 4, were developed based on the Phase 1 findings and they required further investigation in Phase 2.

Phase 1 influenced the development of many of the items for the survey. Analysis of the transcripts was very insightful, but also generated further questions, such how to best create survey items examining roles and career self-concept, in addition to the two new research questions.

The Phase 2 survey consisted of 13 sections:

1. Retirement and pension information
2. Details about previous paid-work
3. Skills and abilities in paid work
4. Skills and abilities in volunteer activities
5. Career self-concept – open-ended questions and scale items
6. Context questions
7. Well-being measure
8. Knowledge use
9. Openness to learning measure
10. Learning goals
11. Choice of activities
12. Details on volunteer activities
13. Demographic information

The retirement and pension items were based on the literature. Construction of the survey items for previous paid work (e.g. industry) and skills and abilities in paid work and volunteer activities were based on Human Resources and Skill Development Canada’s (2006) National Occupational Classification (NOC) and the Campbell Interest and Skill Survey (Pearson Assessments, 2008). The context questions were based on the results from Phase 1. The knowledge items were based on the literature and the Phase 1 results.

The openness to learning measure was based on items measuring openness to experience which used similar items, such as ‘Is curious about many different things’ (John, Naumann & Soto, 2008); however, this measure was adapted using the literature on older adults and lifelong learning. The choice of volunteer activities items and the learning goals question were based on the Phase 1 results. The items for the well-being measure were based on similar items in the literature (Arthaud-Day, Rode, Mooney & Near, 2005; Everard, 2009; Moen & Fields, 2002).

The items for the career self-concept were piloted and tested prior to selecting 10 items for inclusion in the survey. Details of this process are in Chapter 6 and Appendices F, G, H, I, J and K.

In developing the volunteer activities and demographic questions, on-line Statistics Canada surveys (www.statscan.ca) and the questionnaire from Caring Canadians, Involved Canadians (Hall et al., 2006) were consulted. The Phase 1 participants, my thesis committee and a focus group of retirees provided feedback on the first draft of this survey.

Survey validity. Using Phase 1 to explore the research questions assisted with establishing content validity (Johnson & Turner, 2003). Content validity was especially critical to the survey to make sure that the items adequately represented the key concepts being tapped in
the research questions. The Phase 1 results helped to strengthen content validity, as did receiving input on drafts of the survey from the thesis committee and the focus group in Phase 1.

Construct validity was also important in this study (Johnson & Turner, 2003). Research question 2 examined career self-concept. This is an abstract term. Super et al. (1996) used a role salience assessment within career counselling for the roles in this model. While the role salience assessment was designed for a different age group and for a different purpose, this instrument was helpful for career self-concept as well because it indicates that process (transition, role salience) and content (skills, abilities) aspects of the worker role are important for investigating the career self-concept. Therefore, these were incorporated into the career self-concept index.

In Phase 2, there were two issues concerning representative sampling. First, to confirm the findings of the Phase 1 case study, a large sample was required. Phase 2 included 214 participants and this sample is large enough to offer some statistical power and provide some confidence in the findings. This sample size can provide enough participants in each subgroup for statistical calculations on the data. Second, the sampling target in Phase 2 was the nonprofit organizations across the country. Since a sampling frame of retired volunteers was not available, the best option was to use the sampling frame of nonprofit organizations. This means, however, that the sample was not representative of retirees who volunteer in Canada. Instead, the results are reflective of a voluntary sample of retirees who volunteer with nonprofit organizations. Therefore, generalizability is an issue with this study because the sample is not representative of the larger population (Collins et al., 2007), and the results must be interpreted with caution.

Survey reliability. Cronbach’s alpha helped to assess the reliability of the career self-concept index, the openness to learning measure and the well-being measure. The Cronbach’s alphas on these three measures were .76, .75 and .88, respectively.
Data Analysis Procedures

For Phase 1, the data analysis procedures are described in detail under the section ‘Procedures’, near the beginning of the chapter. The process, as noted, was flexible and dynamic (Merriam, 1988).

Items investigating the seven research questions were incorporated into the Phase 2 survey, and the results were analyzed as shown in Table 4.1. Details for the coding of the open-ended questions in Phase 2 are presented in Chapter 6, as are the details for the construction of the career-self concept index.

Table 4.1
Phase 2 Research Questions and Method of Analysis

<table>
<thead>
<tr>
<th>Research Question</th>
<th>Concept</th>
<th>Analysis of Phase 2 Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>RQ 1</td>
<td>Skills and Abilities</td>
<td>Cross tabulations and chi square statistics</td>
</tr>
<tr>
<td>RQ 2</td>
<td>Knowledge</td>
<td>Open-ended question coded into knowledge categories; Frequencies for the categories</td>
</tr>
<tr>
<td>RQ 3</td>
<td>Context: Population and Workplace Location</td>
<td>Frequencies</td>
</tr>
<tr>
<td>RQ 4</td>
<td>Learning Goals</td>
<td>Cronbach’s alpha, mean, mode, standard deviation calculated for 5-item for the measure; Scale scores calculated for each participant; Open-ended question coded into learning types; Frequencies for the categories</td>
</tr>
<tr>
<td>RQ 5</td>
<td>Choice of Volunteer Activities</td>
<td>Frequencies</td>
</tr>
<tr>
<td>RQ 6</td>
<td>Career Self-Concept</td>
<td>Open-ended questions coded into categories; Frequencies for the categories</td>
</tr>
<tr>
<td>RQ 7</td>
<td>Career Self-Concept</td>
<td>Career self-concept scale developed using ConstructMap software and analysis; Cronbach’s alpha, mean, mode calculated for the scale; Scale scores calculated for each participant; Independent samples t-test for skills and knowledge, Independent samples t-test for choice items, Independent samples t-test for career self-concept roles</td>
</tr>
</tbody>
</table>
Conclusion

This chapter presented the methodology for this study. It described the mixed methods design and the two phases of data collection, the participant recruitment and the limitations of this study. Details related to these issues are also addressed in chapters 5 and 6, where the results are presented for Phase 1 and 2, respectively.
Chapter 5: Phase 1 Case Study

The oldest trees often bear the sweetest fruit.

German proverb

For age is opportunity no less
Than youth itself, though in another dress,
And as the evening twilight fades away
The sky is filled with stars, invisible by day.

Henry Wadsworth Longfellow, *Morituri Salutamus*
Longfellow (1874, Lines 282-285)

This chapter focuses on the findings from the Phase 1 case study which consisted of semi-structured exploratory open-ended interviews with twelve retirees who were volunteering with nonprofit organizations. The case study was conducted in 2008.

Research Questions

The five research questions explored in this case study are:

1) Do retirees use the skills and abilities that they developed through their paid work experiences in their volunteer activities?

2) Do retirees use the knowledge that they developed through their paid work experiences in their volunteer activities?

3) Are the contexts of retirees’ paid work experiences and their volunteer activities similar?

4) What learning opportunities have retirees had through their volunteer activities?

5) Do retirees’ career self-concepts change through their volunteer activities from those they developed during their paid-work careers?

All participants contributed more than three hours per week to their volunteer activities and three volunteered much more than this. An additional three participants volunteered
significantly more than this amount, putting in from 20 to 40 hours a week; although, one of these reported only doing this during certain times of the year.

Five men and seven women were interviewed. Three participants had retired from blue collar jobs and nine had retired from professional jobs. Their paid occupations were in the following industries: sales and service, health care, government services, automotive manufacturing, education, law and legal services, and information technology and computers.

All of the participants had some college or some university education. The majority of participants completed a formal educational program and obtained a college diploma or a university degree. The participants were predominately middle class and Caucasian. They all lived in Southern Ontario and this facilitated travelling to conduct the interviews.

The participants volunteered with a variety of nonprofit organizations, and most volunteered at more than one organization. These organizations can be categorized into social service, arts and cultural, educational, religious, political and environmental organizations and co-operative housing. Two participants lived in co-operative housing and they volunteered at the co-op in addition to their other volunteer commitments.

The participants had been retired between 8 months and 6 years. Some of them retired from very demanding paid jobs, and used to put in very long hours. The participants varied with regard to their process of retirement, with some describing a smooth transition and others describing a transition that was initiated for health reasons. The reasons for retirement ranged from managing stress to complying with mandatory retirement legislation that was in effect before December 2006. Some participants still worked for pay, either occasionally or part-time. Key demographic data on all 12 participants are presented in Table 5.1 to contextualize their paid work and volunteer experiences.
Table 5.1

Participants and their Demographic Data

<table>
<thead>
<tr>
<th>Participant Number and Basic Demographic Characteristics</th>
<th>Retirement and Volunteer Demographic Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant 1: Female, Age 63, Married; B.Ed.</td>
<td>Retired 4 ½ years ago in 2003, High School Teacher; 3 Organizations, 9 to 10 hours per week.</td>
</tr>
<tr>
<td>Participant 2: Female, Age 67, Divorced; Some college</td>
<td>Retired 2 years ago in 2006, Health Care Aid; 4 Organizations, 10 hours per week.</td>
</tr>
<tr>
<td>Participant 3: Male, Age 57, Married; University degree</td>
<td>Retired six years ago in 2002, Automotive Inventory Technician; now self-employed; 1 Organization, 3 hours per week</td>
</tr>
<tr>
<td>Participant 4: Male, Age 55, Married</td>
<td>Retired 6 years ago in 2002, Automotive Sales; now security guard; 3 Organizations, 30 to 35 hours per week.</td>
</tr>
<tr>
<td>Participant 5: Male, Age 72, Married; University degree</td>
<td>Retired Lawyer, worked long hours; now self-employed; 3 Organizations, 3 hours per week.</td>
</tr>
<tr>
<td>Participant 6: Male, Age 62, Married; Master’s degree, B.Ed.</td>
<td>Retired 4 ½ years ago in 2003, Retired Principal, 60-70 hour work week; 1 Organization, 35 hours per week.</td>
</tr>
<tr>
<td>Participant 7, Female, Age 63, Married; B.Ed.</td>
<td>Retired 6 ½ years ago in 2001, Assistant Daycare Supervisor, 35 hour work week; now supply teaching occasionally; 4 Organizations, 5 to 6 hours per week.</td>
</tr>
<tr>
<td>Participant 8: Female, Age 57, Single; University degree, B.Ed.</td>
<td>Retired 4 ½ years ago in 2003, Elementary School Teacher, Worked long hours; 4 Organizations, 10 to 12 hours per week on average (40 hours per week during peak times).</td>
</tr>
<tr>
<td>Participant 9, Female Age 59, Married; University degree, B.Ed.</td>
<td>Retired 5 ½ years ago in 2002, Elementary School Teacher, 3 Organizations, 7 hours per week.</td>
</tr>
<tr>
<td>Participant 10: Female, Age 56, Married; University degree, College diploma</td>
<td>Retired 2 years ago in 2006, Chemical, Environmental, Health and Safety Technician, 40-hour work week; 1 Organization, 4 to 5 hours per week.</td>
</tr>
<tr>
<td>Participant 11: Male, Age 66, Divorced; University degree</td>
<td>Retired 1 year ago in 2007, Computer Programmer/Analyst, 35-hour work week; 5 Organizations, 13 to 14 hours per week.</td>
</tr>
<tr>
<td>Participant 12: Female, Age 60, Married; B.Ed.</td>
<td>Retired 5 years ago in 2002, Elementary School Teacher; 2 Organizations, 3 to 5 hours per week.</td>
</tr>
</tbody>
</table>
Key Case Study Findings

Research Question 1: Skills and Abilities

The retirees reported using a wide range of skills and abilities in their paid work and most of the retirees felt that these were transferred to their volunteer activities. For example, organizational skills, communication skills, motivational skills, problem solving skills, prioritizing skills, writing skills, sales skills, teaching skills, interpersonal skills and computer skills were all mentioned as being transferred from paid work to volunteer activities. Table 5.2 provides some selected examples of the participants’ skills and abilities.

Table 5.2
Selected Examples of Responses about Using Skills and Abilities in Volunteer Activities

<table>
<thead>
<tr>
<th>Response</th>
<th>Type of Skill and Ability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant 1 (Female, Age 63, Retired from Teaching High School): “I think dealing with needy people, maybe, being able to talk to people, with compassion and whatnot…”</td>
<td>Interpersonal Skills; Dealing with Crises; Public Speaking; Evaluating and Problem Solving</td>
</tr>
<tr>
<td>“…evaluating a situation. You know what else, the other one is being able to stand in front of people and do things, which you have to do, which I’ve done at the [retirement home], calling bingo for example…”</td>
<td></td>
</tr>
<tr>
<td>Participant 4 (Male, Age 55, Retired from Sales): “…my sales skills, the meet and greet was my comfort zone. I was not in a hurry, I took time. I had energy and patience in terms of communicating. I never was tired of the shop and sales and team collective, bring a sale to resolution.</td>
<td>Interpersonal Skills, Communication Skills, Sales Skills</td>
</tr>
<tr>
<td>Participant 5 (Male, Age 72, Retired Lawyer): “I... encourage, promote. Organize fundraisers events. Motivate people. I’m a good speaker. I think those are all assets. You have to contribute something, some skills to help the organization. ... I learned how to persuade people. I could speak, I was trained as a debater. Those are learned skills. You have to be outgoing. You have to be genuinely caring. You have to believe in what you’re doing. I think in the end it’s to sell ideas to society. Selling ideas required you to have a number of things, the skills of the salesman but you also have to be blessed with the ideas .... It’s something I do every day of my life.</td>
<td>Organize Fundraisers; Good Speaking Skills; Persuasion; Motivate; Sell Ideas</td>
</tr>
<tr>
<td>Response</td>
<td></td>
</tr>
<tr>
<td>---------------------------------</td>
<td></td>
</tr>
<tr>
<td>Participant 6 (Male, Age 62, Retired Principal): “I am known for my environmental knowledge, my skills working with people, problem solving, seeking solutions, organization skills … I am community minded, and pay attention to how I treat others. I try to use my communication skills and am a proactive leader.”</td>
<td></td>
</tr>
<tr>
<td>Participant 7 (Female, Age 63, Retired Assistant Daycare Supervisor): “I use my skills doing organizational activities. There is lots of planning … planning for the children at the school and at the film festival must be organized. Of course, my computer skills are used … I use my knowledge of child development, but I don’t work directly with children anymore, but for creating and developing educational tools for children and teachers.”</td>
<td></td>
</tr>
<tr>
<td>Participant 11 (Male, Age 66, Retired Computer Programmer/Analyst): “You’d get a project and you’d talk to the business analyst, who are financial officers in the department…It was a lot of listening to what the end users wanted and sort of team work…Listening, communication skills, technical skills as a programmer…”</td>
<td></td>
</tr>
</tbody>
</table>
| Participant 12 (Female, Age 60, Retired Elementary Music Teacher): “The teaching skills I developed over the years helped me in developing relationship with these seniors. If the people in the nursing home were shy or showed timidity, extreme care [was] taken with them. The trained professional staff was amazed at my ability to interact with the seniors. I recognized that they are in a delicate state emotionally and physically … I recognize the need for sensitivity and training as a teacher. My past career involved working in many situations with hundreds of kids. In and out of classrooms, kids with special needs, cerebral palsy, [junior kindergarten] and [senior kindergarten], kids who were being taught how to speak and I had to be careful with them …. I had an ability to just bring joy to people in the nursing home. I don’t just bring in the music; I bring in the teaching skills”.

Participant 12 (Female, Age 60) spoke about her ability to transfer her skills with special needs children to her volunteer activities with seniors. She viewed it this way: “You don’t label it anymore. It is not that ‘I have these skills’ – not a totality anymore. It is who you are.”

While he did use his skills and abilities in his volunteer activities, Participant 3 (Male, Age 62) clearly stated: “It is not important for me to utilize the skills and abilities from my paid
work in my volunteer activities. That is not a goal.” Thus, for him, this was not a planned choice.

When asked to further explain this, he said:

I got on the fundraising committee. My business connections were kind of just luck. I was on the committee at [work] to put computers in schools, and the president of [the nonprofit] came in to speak to me about their annual fundraising event. I told him they were asking too much for the tickets for the average person to go golfing. He asked me to get involved in the fundraising. The president said you should be on the board of directors and in charge of the fundraising committee. With my contacts, I got twice as much money for [the organization]; we ended up charging even more for the tickets.

During the interview, the participants were asked to quantify the percentage of their paid work skills and abilities that were being used in their volunteer activities. Almost all of the participants felt that more than 50% of their skills and abilities were being utilized through their volunteering. For some this was planned; for others it just happened without forethought or planning. Generally, the participants indicated that their skills were not completely transferred to their volunteer activities; however, one of the retirees felt there was a perfect match between his pre-retirement skills and abilities and volunteer activities, and two others felt there was a really strong match. Only one retiree, who had not enjoyed his work, felt that there was only a small amount of skill and ability transference to his volunteer activities. He chose to develop and cultivate very different skills and abilities through volunteering:

I don’t want to pretend that nothing is transferred, but I see [my volunteer work] as completely different. The key difference in work as an analyst was that I worked alone. Now that I’m retired, I see it as completely different. I want to be less focused on small specific things that I work on alone as opposed to working with other people and being part of a social group of some kind and working with people, whether it is a group of kids or little kids or out on the trails, other groups. I still find being alone very important. But I like working with other people ….
Teamwork, being part of a social world was missing from my previous work especially in my last job. (Participant 11; Male, Age 66)

**Research Question 2: Knowledge**

The majority of participants felt their knowledge had been transferred to their volunteer activities. Some examples were: environmental, financial, political, government structure, language and health and safety. Awareness of dealing with difficult people and familiarity with problem solving techniques also were mentioned, as was aging and adult development and child development knowledge:

I volunteered … with the Family Resource Centre when I retired, trying to keep a connection with the early childhood stuff. (Participant 7; Female, Age 63)

[With the Film Festival], I am working with what I know children will be interested in, using my knowledge of what is appropriate and not appropriate….creating pre- and post-viewing activities using my knowledge, understanding timing, how long children can sit there, and my knowledge of the curriculum they are learning at school. (Participant 8; Female, Age 57)

[Knowledge of] working with people is the essential one. Also, the problem solving angle. When you’re in education you are solving problems every day, or seeking solutions. I told my staff “There are no problems, just solutions, so let’s concentrate on the solutions.” There are also organizational skills in there. How do you organize people? How do you organize events? None of us is perfect in that, but you get better as you go along. Sometimes through the school of hard knocks you learn. (Participant 6, Male, Age 62)

Participant 10 (Female, Age 56) stated that her knowledge of municipal government, its hierarchy, processes and procedures, as well as her specialized environmental, health and safety knowledge, have been useful to the Sustainability Network: “There is an overall understanding of how this stuff works. That was information I could help them with.”
Research Question 3: Contextual Factors

There was continuity between some paid work contextual factors and volunteer activities, with some participants wanting these specific factors to be present in the volunteer work that they did:

… I used to be a nurse. When I retired, I just couldn’t stay away from the elderly. And here I am. Still being with them...This is where I’m meant to be, helping in a retirement home and in long term care. I’ve always enjoyed being with the elderly…. (Participant 2; Female, Age 67)

We choose volunteer activities that reflect our career. I tried not to do career-related stuff and came back to working with children, to where I am most comfortable and where my strength is. (Participant 9; Female, Age 59)

Participant 3 maintained the contacts he developed during his career and used them to promote and fundraise for the nonprofit he volunteers with. His contacts included professional athletes and people working in business, and both were excellent draws for fundraisers. This participant knew he wanted to work with nonprofits in a sports-related capacity. Several other participants chose to volunteer in school, education, or public education settings after they retired from teaching or being a school principal. For example, the former principal volunteered in public awareness and outreach related to environmental issues and two of the retired teachers volunteered with a film festival that had a mandate to increase the public’s appreciation for and awareness of arts and culture and social justice.

Research Question 4: Learning through Volunteering

Almost all of the participants stated that they enjoyed learning new things. They saw opportunities for learning in their volunteer activities; however, when asked to provide some examples of this, many had trouble specifying learning opportunities they had. This may be
because of the tendency to associate learning with formal education. Nevertheless, some interesting examples of new learning were provided:

Computers: that is a skill that I’m learning. I’m not good at articulating ideas. Because of my volunteer role at Amnesty, I’ve had to speak to a group or speak to the press and that is something that I find very challenging. It is something that I am growing into. I have been watching, observing … I’m trying. (Participant 7; Female, Age 63)

The annual conference: I love learning about it. Some of the things that I’ve learned, I just go “Wow, I didn’t know that.” The things you can learn. I am feeding my intellectual curiosity. I am learning things that fascinate me. (Participant 5; Male, Age 72)

The nurses and staff wheeled in other people in the home to listen to my music.... At first going up to the nursing home, the degree of degeneration, physically and mentally is unreal, but the woman who works in Recreational Activity says it is a community of people. She said “Get to know them as people. They are not beings waiting to die. Get to know them. Follow through and get to visit regularly with them, and be part of them.” (Respondent 12; Female, Age 60)

At this point in my life I’m learning a lot more than I ever thought. I’m going back to the seniors again, these last few years have really shown me a lot about seniors and how much we should respect them, converse, and pick their brains and talk to them. When you don’t have anybody that’s close to you that’s in that category, they’re there, that’s all, and ridiculed a lot of times too. But since we’ve been going over to the [seniors’ home], I’m still going there a lot. These senior citizens, they’re wonderful people and they need to be more respected than they are. I’ve learned a lot about them since I’ve retired. They’re lovely. (Participant 1; Female, Age 63)

In discussing her very first experience volunteering with the crisis line, this same participant mentioned the training she received prior to becoming a volunteer in this role:
At the sexual assault centre, when I did the crisis line, we had to go for training, of course. I think when I first started with that, it was very stressful because you don’t know who is going to phone, what they are going to say to you. And things like that. It was very stressful. After a few shifts, you kind of get in the feeling...and most people who phone want a listener. Of course, sometimes you have to suggest things to them, which is fine. But when I first started volunteering there, it was scary …. And even dealing with crises, things like that. The crisis line, I’m still not very good at that. I never was; I’m such a high-strung person. I’ve learned that I can deal with it, not maybe as well as other people, but I can deal with it. Absolutely! (Participant 1; Female, Age 63)

During the discussion of Research Question 2 and knowledge above (see page 97), one quote was from Participant 6, who spoke about the on-going nature of learning. He added that, as an educator, he recognized that he continues to learn and he must keep up with information. The example of learning he provided was that he received an Award of Distinction from the local Conservation Authority for his work and, through the process of doing environmental preservation and promotion, he learned a lot about the environment.

One respondent described an uncomfortable learning experience that made her more self aware:

I was learning with the Alzheimer’s patients, and I didn’t use my knowledge and experience as often; with the hospice, too. Maybe I was out of my comfort zone, which is working with children. I didn’t push myself. I quit with Alzheimer’s after one month. (Participant 9; Female, Age 59)

**Research Question 5: Self-Concept**

Self-concept is a complex construct, and developing questions to tap this construct was hard. During the interviews, focusing on the self-concept and specifically the self-concept
connected to one’s career was difficult. Table 5.3 presents themes that emerged during the interview and predominantly focused on the present self.

Table 5.3

<table>
<thead>
<tr>
<th>Response</th>
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</thead>
<tbody>
<tr>
<td>Participant 1 (Female, Age 63, Retired from Teaching High School): “Independence …. For example, I insist on having my own car .... But it is kind of a feeling of being independent enough that I have my own car still … I think being independent ... being able to manage …. I think a big part of me is needing to be needed. And as tough as these last few years were, I’d go over to the Manor when my mom was sick four or five times a day for the last a year. And she was very sick. As horrible as it was for her and it was pretty awful on me because I’d been through a lot of stress ... I was feeling right now nobody needs me. So maybe the volunteerism fills a gap too.”</td>
</tr>
<tr>
<td>Participant 2 (Female, Age 67, Retired Health Care Aid): “I care a lot more about other people, maybe than myself sometimes. Being retired I have a lot of time on my hands so I’d rather fill it in with helping other people. I care about everybody.”</td>
</tr>
<tr>
<td>Participant 4 (Male, Age 55, Retired from Sales): “community volunteer … community leader…community activist … community convener … I am a community-minded guy”</td>
</tr>
<tr>
<td>Participant 5 (Male, Age 72, Retired Lawyer): “I’m a Lawyer. A former politician. Red conservative. I like winning. I like intellectual stimulation. Tend to be a gregarious person. I’m effective at what I do, and that sounds egotistical: it helps to have ego too. Good at persuading people. I’m ethical, believing in strong convictions …. You have to be genuinely caring.”</td>
</tr>
<tr>
<td>Participant 8 (Female, Age 57, Retired Elementary School Teacher): “I’m not a painter, a musician or a crafty person. But I am a very fine organizer.”</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Self-Concept</th>
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</thead>
<tbody>
<tr>
<td>Independent Woman, Helping Others, Self-Esteem; Needing a New Role</td>
</tr>
<tr>
<td>Caring/Helping</td>
</tr>
<tr>
<td>Community-Minded</td>
</tr>
<tr>
<td>Confident; Persuasive; Gregarious; Good at Meeting People; Ethical; Genuinely Caring</td>
</tr>
<tr>
<td>Organizer; Helping Others using Strengths</td>
</tr>
</tbody>
</table>
Some of the participants identified themselves as retirees from their previous paid work, but not all of them. Some participants described themselves from the perspective of their volunteer role. For example, one participant could not decide how he liked to be called, but it connected to his volunteer activities: “community volunteer … community leader … community activist … community convener” (Participant 4; Male, Age 55). The participants saw themselves as volunteers who were needed in the community. They embraced the volunteer role, and they thrived on it; however, they did not all like the word ‘retirement’ and some did not describe themselves as ‘retired.’

Self-esteem is closely tied to the self-concept construct and one commonality among the participants is that volunteering contributed to their self esteem; it therefore impacted their self-concept. One said: “I get a lot of self-esteem and sense of fulfillment [from volunteering]” (Participant 2; Female, Age 67). The participants described how they received a lot from volunteer activities and they actually engaged in these activities for what one participant
described as ‘selfish reasons’ (Participant 1; Female, Age 63). Furthermore, their volunteer activities not only provided them with a strong sense of self-esteem and fulfilled their desire to help others and make a contribution to society, but they also made friends through their volunteer activities. Enhancing their social network was a very positive experience for them.

In addition, three topics related to the self emerged from the transcripts. These were the idea that the participants know themselves very well, the fact that some of them have confronted ageism during retirement and the idea of an overarching life theme. Table 5.4 provides a summary of these 3 themes for each participant, which will be discussed in further detail next.

Table 5.4

Summary of Themes on the Self Discussed During Interviews

<table>
<thead>
<tr>
<th>Participant and Key Demographic Characteristics</th>
<th>Major Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant 1: Female, Age 63, Married, Retired from Teaching High School in 2003. Volunteered with 3 Organizations 9 to 10 hours per week.</td>
<td>Ageism; Life Theme</td>
</tr>
<tr>
<td>Participant 2: Female, Age 67, Divorced, Retired as a Health Care Aid in 2006, 3 Organizations, 10 hours per week.</td>
<td>Ageism; Life Theme</td>
</tr>
<tr>
<td>Participant 3: Male, Age 62, Retired, Automotive Inventory Technician, 1 Organization, 3 hours per week.</td>
<td>Life Theme</td>
</tr>
<tr>
<td>Participant 4: Male, Age 55, Retired from Sales in 2002. Volunteered with 3 Organizations, 30 to 35 hours per week.</td>
<td>Know Self Well; Ageism; Life Theme</td>
</tr>
<tr>
<td>Participant 5: Male, Age 72, Retired Lawyer, 3 Organizations, 3 hours per week.</td>
<td>Give Back to Community; Life Theme</td>
</tr>
<tr>
<td>Participant 6: Male, Age 62, Retired Principal 4 Organizations, 35 hours per week</td>
<td>Life Theme</td>
</tr>
<tr>
<td>Participant 7: Female, Age 63, Retired Assistant Daycare Supervisor, 4 Organizations, 5 -6 hours per week.</td>
<td>Life Theme</td>
</tr>
<tr>
<td>Participant 8: Female, Age 57, Retired Elementary School Teacher in 2003, 4 Organizations, 10 to 12 hours per week.</td>
<td>Know Self Well; Life Theme</td>
</tr>
<tr>
<td>Participant 9: Female, Age 59, Retired Elementary School Teacher, 3 Organizations, 7 hours per week.</td>
<td>Know Self Well; Ageism</td>
</tr>
</tbody>
</table>
Kno\textbf{w} themselves well. The first theme that emerged is that these women and men have reached a point in their lives where they know their strengths and weaknesses, their likes and dislikes, and they are comfortable with themselves:

[I] came back to working with children, to where I am most comfortable and where my strength is. (Participant 9; Female, Age 59)

Retirement gives you enough time where you’ve mastered yourself and interpreted what you are good at, so you can work with your strengths. (Participant 4; Male, Age 55)

So it’s really looking at who you are and what you are comfortable doing. And choosing to do activities that suit you. I’m not a painter, musician or a crafty person, but I am a very fine organizer. (Participant 8; Female, Age 57)

When you learn to be you, you are freed up from the self to be yourself and appreciate others and soak up others and forget yourself. You have a spark in your eyes and others know you are ready to listen to them. You are deeply caring about people. (Participant 12; Female, Age 60)

Ageism or age discrimination. Ageism or age discrimination has a negative impact on the self. Four participants spoke openly about experiencing age discrimination within their previous workplace and other social settings (see Table 5.4):
I’ve noticed it talking to people who are still working, when I say something, it has been disregarded and depreciated. Not in every environment. At church there are a lot of retired people there, I don’t notice it there. But when I go back to (my paid work) which I do every week to go to fitness classes, and I chat with people just a little, you feel it. You’re not that relevant. [Do you think it is coming from ageism?] I think so. They are all involved in quote unquote important things that they do and, being retired, I don’t have important things that I do. I think that’s what it has to do with. And ageism, I think it has to do with retirement, I think. Just you’re in a different class somehow, not quite the same class, but a variant. The first few times it made me feel bad. Then you realize that’s okay. It disturbs for a moment but once you realize what is going on, you realize it’s okay.

( Participant 11; Male, Age 66)

Other participants expressed similar sentiments about aging:

[I feel] annoyed at been seen as old and aging, viewed older than you see yourself.

(Participant 9; Female Age 59)

I was annoyed that [my children] think of me as a bit older than I think I am. That’s aging. Especially with my daughter because she is a teacher of grade one now. She will look at me and think, “Maybe she doesn’t know what she’s talking about.” (Participant 9; Female)

**Life story or life theme.** Data from an additional theme in the interviews – life themes pertaining to their sense of selfhood – are presented in Table 5.5.
### Table 5.5

*Selected Examples of Open-Ended Responses and their Related Life-Theme or Life Story*

<table>
<thead>
<tr>
<th>Open-Ended Response</th>
<th>Life Theme or Life Story</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant 1 (Female, Age 63, Retired High School Teacher):</strong> “You get very involved, especially when you’re in a special education or alternative education or something like that those kids are needier. And if you are any kind of a compassionate person you can’t help but get involved with them.” (Mentioned “help” or “helping” 22 times during hour and a half interview.) “As opposed to some other jobs, may be the difference when you retire [from teaching], all of a sudden you’re not helping people, you’re not there for people anymore.”</td>
<td>Independent, Successful Career Woman; Family Focused; Caregiver to her Mother; Helping People</td>
</tr>
<tr>
<td><strong>Participant 2 (Female, Age 67, Retired Health Care Aid):</strong> “I had [my grandparents in my life] for a long, long time and I think that’s part of the reason why I wanted to be with seniors and the elderly. I love them and respect them and I just continued on.” “When I retired, I just couldn’t stay away from the elderly.”</td>
<td>Close Relationship with her Grandparents; Working with the Elderly</td>
</tr>
<tr>
<td><strong>Participant 3 (Male, Age 62, Semi-Retired, Automotive Inventory Technician):</strong> “I was extremely involved in sports, all sports, especially hockey, when I was growing up.” “They put me in charge of finding worthwhile causes that we should contribute to …. I put on special events and invited athletes to attend.” “I run the annual golf tournament fundraiser…..”</td>
<td>Love of Sports; Helping Others in the Community</td>
</tr>
<tr>
<td><strong>Participant 4 (Male, Age 55, Semi-Retired, Automotive Sales):</strong> “At age 20, I decided I’m good with people. I realized [name] the skill you’ve got because you are communicating with people, you can provide knowledge in a non-offending way with the trust you’ve built …..” “I don’t know the best term … a community volunteer ... a community leader ... a community activist ... a community convenor ... I am a community-minded guy.” “I plant seeds. The seed is sprouting and I’m not in a hurry.”</td>
<td>Community Minded; Community Builder; People; Joy in Life</td>
</tr>
<tr>
<td><strong>Participant 5 (Male, Age 72, Semi-Retired Lawyer):</strong> “Before [I retired, I worked] 45 hours … at least 40 hours … 40 to 45 hours billable, minimum of 6 days a week and I worked at least 4 nights a week running a large department, and I had a huge practice.” “Winning ... it’s a high. It is the most exciting game in society. I like the challenge. I like working with people. I like to sit down and try to persuade people…”</td>
<td>Work Hard; Be Active; Sell Ideas</td>
</tr>
<tr>
<td>Open-Ended Response</td>
<td>Life Theme or Life Story</td>
</tr>
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<td>-----------------------------------------------------------------------------------</td>
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<tr>
<td>Participant 6 (Male, Age 62, Retired Principal): “[My] sense of wanting to help the community. I love the community. I love the Credit Valley. It is a resource, a source of enjoyment. We have to protect what we have.”</td>
<td>Community Minded; Community Builder; Communicator; Committed to Environmental Issues</td>
</tr>
<tr>
<td>Participant 7 (Female, Age 63, Retired Assistant Daycare Supervisor): “I am more involved in the problems in the world, more aware of poverty and the environment.”</td>
<td>Family Focused; Committed to Social Justice and Environmental Issues; Community Minded</td>
</tr>
<tr>
<td>Participant 8 (Female, Age 57, Retired Elementary School Teacher): “[I] came back to working with children, to where I am most comfortable and where my strength is.”</td>
<td>Helping People; Working with Young People</td>
</tr>
<tr>
<td>Participant 9 (Female, Age 59, Retired Elementary School Teacher): “I’m quite humourous. Great sense of humour enjoy a good time. A typical mother. Very giving to my family …. I wanted to work with little kids.”</td>
<td>Family Focused, Working with Children</td>
</tr>
<tr>
<td>Participant 10 (Female, Age 56; Retired Chemical, Environmental, Health and Safety Technician)</td>
<td>Process and Procedure Focus; Environment, Health and Safety</td>
</tr>
<tr>
<td>Participant 11 (Male, Age 66, Retired Computer Analyst)</td>
<td>Working with People; Active and Engaged</td>
</tr>
<tr>
<td>Participant 12 (Female, Age 70, Retired Elementary School Music Teacher): “I pulled out the hymn book and said ‘Let’s sing, Mary.’ The nurses and staff wheeled in other people in the home to listen to my music. I take on a supportive role, not a leadership role in my [volunteer visiting]. It is the joy of realizing, the joy of giving to others, helping others ... not out of ‘driven-ness’ or responsibility as a primary goal. It comes from a deep personal sense of well-being.”</td>
<td>Joy; People Focused; Spiritual Approach</td>
</tr>
</tbody>
</table>

These life themes emerged almost immediately upon reading the transcript or even during the actual interview, and they describe what motivates and fulfills each participant. Each of these
Themed makes each participant unique; however, taken together, the participants’ collective altruism and active interest in volunteering comes through.

Thoughts on retirement. Retirement was a repeated theme that came up during the interviews and the participants all spoke about several similar aspects of retirement. The findings for these three themes are summarized in Table 5.6 for each participant. First, the participants had interesting views on the concept of retirement:

Retirement is a different stage in your life. You are aware that it is limited and you see how lucky you are; it may not last … it won’t last. It is finite. It makes sense that it is precious. You must be careful of how you are spending that time so there is a continuity. I think the hard thing about retirement is balancing everything and making sure you are doing what you want to do. (Participant 7; Female, Age 63)

Table 5.6
Summary of the Major Themes on Retirement Discussed During Interviews

<table>
<thead>
<tr>
<th>Participant and Key Demographic Characteristics</th>
<th>Major Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant 1: Female, Age 63, Married, Retired from Teaching High School in 2003. Volunteered with 3 Organizations 9 to 10 hours per week.</td>
<td>Transition to Retirement; Active Retirement; Give Back to Community</td>
</tr>
<tr>
<td>Participant 2: Female, Age 67, Divorced, Retired as a Health Care Aid in 2006, 3 Organizations, 10 hours per week.</td>
<td>Active Retirement; Give Back to Community; Transition to Retirement;</td>
</tr>
<tr>
<td>Participant 3: Male, Age 62, Retired, Automotive Inventory Technician, 1 Organization, 3 hours per week.</td>
<td>Active Retirement</td>
</tr>
<tr>
<td>Participant 4: Male, Age 55, Retired from Sales in 2002. Volunteered with 3 Organizations, 30 to 35 hours per week.</td>
<td>Transition to Retirement; Give Back to Community;</td>
</tr>
<tr>
<td>Participant 5: Male, Age 72, Retired Lawyer, 3 Organizations, 3 hours per week.</td>
<td>Active Retirement; Give Back to Community</td>
</tr>
<tr>
<td>Participant 7: Female, Age 63, Retired Assistant Daycare Supervisor, 4 Organizations, hours per week.</td>
<td>Active Retirement</td>
</tr>
<tr>
<td>Participant 8: Female, Age 57, Retired Elementary</td>
<td>Active Retirement; Giving</td>
</tr>
</tbody>
</table>
## Participant and Key Demographic Characteristics

<table>
<thead>
<tr>
<th>Participant and Key Demographic Characteristics</th>
<th>Major Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Teacher in 2003, 4 Organizations, 10 to 12 hours per week.</td>
<td>Back to Community;</td>
</tr>
<tr>
<td>Participant 9: Female, Age 59, Retired Elementary School Teacher, 3 Organizations, 7 hours per week.</td>
<td>Active Retirement</td>
</tr>
<tr>
<td>Participant 10: Female, Age 56; Retired Chemical, Environmental, Health and Safety Technician; 1 Organization, 4 to 5 hours per week.</td>
<td>Giving Back to Community;</td>
</tr>
<tr>
<td>Participant 11: Male, Age 66, Retired as Computer Analyst in 2007, 5 Organizations, 13 to 14 hours per week.</td>
<td>Active Retirement; Giving Back to the Community</td>
</tr>
<tr>
<td>Participant 12: Female, Age 60, Retired Elementary Music Teacher; 2 Organizations, 3 to 5 hours per week.</td>
<td>Active Retirement</td>
</tr>
</tbody>
</table>

A few participants stated they disliked the term ‘retirement.’ They viewed ‘retirement’ as belonging to their parents’ generation and were shunning this traditional view of a quiet retirement, which takes place outside of the public domain. These participants seemed to be actively avoiding it:

I’m retired. I do so much more …. (Participant 10; Female, Age 56)

Retirement is a meaningless term. It is a kind of redirection, doing different things at different times …. I am redirecting my energy and talents into something that offers meaning, satisfaction and enjoyment. (Participant 6; Male, Age 62)

I don’t want to retire. I don’t believe that people keep their mental facilities if they retire. I never have. Everybody I’ve seen retire young intellectually and mentally lost agility. I haven’t seen a case where that didn’t happen. Maybe that’s my bias or something …. I would never retire unless [I lost my] health or I lost my way. Why retire? (Participant 5; Male, Age 72)

The participants viewed themselves as having left their previous paid work and entered a new phase of in life. They discussed how this life milestone affected them, and for some it was a
difficult process, but they all seemed to have made the transition within about 6 months after leaving paid employment. Hence, their self-concept seems to have been transformed quickly after their transition into a volunteer role. Participants had vivid recollections of this transition because of the emotional, social and cognitive changes that resulted:

I think right after retirement, there is a hole there because you’re no longer in the workforce. You’re no longer meeting people every day. You’re no longer ‘productive.’ You’re no longer contributing to society. This is what goes through your mind. The other side is you’ve got all this time now, with an income, fixed as it is, but an income. And you can start doing things that you always wanted to do. (Participant 1; Female, Age 63)

My transition was just fine. I started preparing many years ahead. I took a retirement course and I knew that I wouldn’t be financially terrifically well off, but I knew that I’d be okay. They talked about having things to do .... what I did when I retired, I volunteered at my school almost one day a week, and the next year once a month and I kind of weaned myself off of being there. Those were my good friends. The next year after that I took my primary teacher friend’s class for an afternoon so they could do reading tests. But by then I’d gotten pretty busy with other things. So each year I did something, and this year I didn’t do anything [at my former school]. (Participant 8; Female, Age 57)

I don't think I might have survived retirement without my volunteer work. I have gleaned much more from it than the people for which I volunteer. I have made many friends. (Participant 1; Female, Age 63)

I wasn’t feeling ‘Where’s my life taking me?’, ‘What am I doing with my time?’, ‘How come I don’t feel fulfilled?’ My volunteer world became actually everything I really wanted to go forward with .... (Participant 4; Male, Age 55).

Finally, participants described how their transition to retirement connected to that of their spouse:
I retired in June 2003 … I did almost 30 years of teaching. [My husband] retired in June 2002 and did supply teaching in York for one year, then did supply teaching here [after we moved]” (Participant 1; Female, Age 63).

This is a good example of the concept of linked lives (Giele & Elder, 1998), which comes from the life course perspective. Linked lives are where family influences one’s life transitions. Previous research indicates that spouses consider each other’s career and retirement and take their spouses’ preferences and plans into account when preparing for the transition to retirement (McDonald, 2006).

**Active retirement.** The theme of an active retirement came up repeatedly. The participants viewed themselves as different from past generations of retirees in that they were actively striving to be engaged and productive in retirement as opposed to taking life easy and being at leisure. Participant 5 expressed these sentiments in his quote on the previous page and added: “I know I don’t want to be in a position where I’m not doing something, where I’m not engaged. That’s just me…” (Participant 5; Male, Age 72).

The participants also spoke about freedom and the choices that they have now:

It is a sense of freedom. I’m not making any money doing this. I’m doing it because I want to. That’s good. It’s very important. (Participant 1; Female, Age 63)

In a paid job, you’re getting paid. This makes a difference. It’s a totally different feeling when you are a volunteer. Because when you are paid, it is something you have to do. You are getting paid to do it. In volunteering, you are making a difference with them. You can take the time with them, to sit down and chat and let them know you can take the time to do that . . . There is more freedom within the volunteer role . . . I think volunteer work is more productive. You’re making somebody happy and enjoying being with them. I don’t have to be nice to them to
get paid. That makes a big difference....Being a volunteer makes a big difference to me. (Participant 2; Female, Age 67)

Some participants were so busy that they required balance:

I think the hard thing about retirement is balancing everything and making sure you are doing what you want to do. (Participant 7; Female, Age 63)

You don’t want to sound like you’re an unbalanced person. I try to keep a balance with my volunteer work. (Participant 8; Female, Age 57)

Further evidence of these participants’ desire to be active and productive is the fact that many found other paid work to pursue. Four were working for pay in second careers, self-employment, new businesses or consulting. They wanted the money or the cognitive stimulation. One participant said:

The sole reason I’m still working is the much needed monetary gains. (Participant 4; Male, Age 55)

Boredom was the main reason for me to work after I retired. The money I make from my job is ‘play money’ [that allows me to do other things.] (Participant 3; Male, Age 62)

**Meaningful activity that gives back to the community.** Another theme was that the participants viewed volunteering as a meaningful activity that gives back to their community. The participants said they wanted to be involved in their community and they defined their own meaning of community. They experienced their volunteer activities as making a difference in their community:

I feel productive. I feel I'm contributing to the community. My priorities have changed. If I make a commitment to something, it becomes paramount in my life, to keep it. It is so important to be a reliable person in volunteer work. So many
people depend on volunteers. Volunteering is the greatest ego-booster that one will ever have. (Participant 1; Female, Age 63)

That’s one thing about volunteering, really, it’s a gift you give yourself. Lots of times when you are doing things, it’s not really that you are doing things for other people, and I love doing things for my primary teacher friends, right? But, if your volunteer work enhances your life, it helps you to feel that you’re contributing to society, the community you live in and I would rather do that. (Participant 8; Female, Age 57)

I care a lot more about other people, maybe more than myself sometimes. Being retired, I have a lot of time on my hands, so I’d rather fill it in with helping other people. I care about everybody… (Participant 2; Female, Age 67)

[My] parents did not volunteer. They had to keep food on table and a roof over our heads. Their goal was surviving, whereas our generation, I look at us as living, and we can afford to give back. (Respondent 10; Female, Age 56)

I owe. I’ve had a good life. I’ve had a lot of fun. Excitement. Success most people never get to. I like the democracy. I think it’s threatened by attitudes right now. Not the attitudes of ignorance. They are the attitudes of the people who have been here too long without thinking what they owe. I believe I’m contributing back and believe I should contribute back. (Participant 5; Male, Age 72)

Although all but two of the participants engaged in volunteer activities prior to their retirement, after their transition to retirement, the participants found opportunities to give more to their community. Some of them cultivated new additional volunteer commitments upon retirement, but most maintained their volunteer commitments from before retirement and increased the number of hours devoted to these activities.
A Closer Look at Two Participants

The key findings in the Phase 1 case study can be illustrated by examining participants 1 and 11 in further detail. Participant 1 is more typical in the case study, whereas participant 11 described a more atypical career trajectory and retirement and volunteer experience. For confidentiality reasons, the participants have been assigned the pseudonyms of Marie and Glen.

Glen provided an important perspective, one that was unexpected but which was incorporated into Phase 2 and led to refinement of the survey. Unlike the other 11 participants, Glen emphasized that his volunteer work was an opportunity to develop and use skills he valued but had not been able to use in his paid work. In fact, Glen was the only participant who stated he did not like his job and this impacted upon the transference of his skills and knowledge. All the other participants had a real passion for their paid work. Because of the importance of this participant’s perspective, it is described below in more detail.

Marie was chosen from among the other 11 participants to illustrate a more typical perspective. Marie was married (5 out of 7 female participants were married), and six months after her retirement, she moved. Marie helped her mom relocate, so they could be closer geographically. Her mom became ill; then, shortly after, her mom died. She was very candid with her comments and insights about her transition to retirement. It was a difficult period for her, and she was able to articulate how much volunteering helped her through this transition, so that at the present time she is settled and feels fulfilled. She also was very caring, and came across as someone who wanted to help others and contribute to her community. Like the other participants in this study, she was very altruistic and giving. Marie described herself as:

... a golden age woman, and I’m trying my hardest to maintain my youth, which I think we all are. It gets more difficult every year. Very high strung, probably drive all my family crazy. I believe family is really the most important thing there
is, especially when you get to this age. I’m trying to enjoy life as best I can. And the last few years have been rather difficult. Our mothers have been really sick and both died this year. And that was rather stressful …. I don’t look after myself probably as well as I should, but I think better than most. I’m very conscious about eating habits and exercise and stuff like that. I enjoy people …. Don’t make friends easily, but when I make friends I keep them for life. I’m still in touch with all my friends from York region quite regularly. And most of the friends that I have made have been through either work, or I’ve made friends over at the manor, volunteers, staff over there. We do things socially now…. My kids mean everything to me. Both of them. I have two and [my spouse] has two and all of them are great kids. I’m at that point in life where you kind of, you used to think about it when you were younger, and think when you get to that age, what is there to look forward to? And that’s basically what I’m thinking at this point. There is a lot to look forward to, you know, when you get this age. And we’re trying to experience as much as we can. We’ve got our trailer, we want to do as much as we can while we can. We’re both in pretty good health and I guess that’s about it.

(Marie)

Glen described himself as:

I am old. (pause) I’ll be 66 in May. And I’m quite happy to be there. I don’t have a feeling of wanting to be 40 or 20. I am very happy, though, that I am fairly active and feel good about that. I like to do more active things in my life as opposed to being involved in processes that involve more thinking and sitting down, more that kind of thing. I don’t own a car. I’d like to think I have a fairly small footprint, ecological footprint. I don’t own a car, I do all my biking. All of my living requirements are through biking, occasionally buses. I sometimes make deals to have somebody go with me in a car. I do have a driver’s license. For instance, to get up into the Gatineaus, on the other side of the river, to go skiing and carry all that stuff, my skis, on the bike would take me a good two hours, maybe a little more than that, so it makes a lot of sense to make deals with people. They drive me and I pay for their day pass to go skiing. I like all kinds of music.
I’m an aerobics teacher which I really like, which surprises me. But I like doing the aerobics movements. I like doing the classes. I teach some, but normally I take them. I’m doing a little bit of weight work now which I never thought I’d like, but it’s okay. I’m taking a course, I’m getting close to becoming a personal trainer as well. I hope it will be for pay. I’m doing it for exchange now. A friend gives me guitar lessons and I’m his personal trainer. (Glen)

Marie, age 63, and Glen, age 66, provided interesting views of their lives. Marie, who is married and has 2 adult children and 2 adult step-children, emphasized how much she values family. She spoke about the death of her mother and her husband’s mother and mentioned the importance of good health and taking care of herself. She said there are things to look forward to at this stage of life and mentioned a joint hobby with her husband. Glen mentioned how he values the environment and being active and discussed his athletic activities. He mentioned the classes he is taking and how he hoped it would become a paid job.

Both Marie and Glen described their previous paid work. Marie was a high school cooperative education and an English as a Second Language (ESL) teacher and Glen was a computer programmer/analyst. Marie described her work as follows:

I did co-op full-time there and then along with a few other things but mostly co-op …. And I finished up my career as head of the alternate education department. And it was really interesting. I enjoyed it. But you get kids that don’t make it in a regular program…But when you bond with those kids, they bond. You can make a real difference with those kids. I did ESL as well. It was a Grade 9 English credit course as well at night school. The principal said: ‘would you be interested in this…I taught it for years. I did ESL for probably 12 of the last years as well. (Marie)

Glen also described his work:
I was doing programming. It was a very good shop. It was very nice. We spent a lot of time, we worked very close with our clients. Essentially they were across the hall. It was nearly always a one person project. So you’d get a project and you’d talk to the business analyst, who are financial officers in the department and we would work with them until the project was over and then we’d get another project. (Glen)

Marie described getting a lot out of her paid work: self-esteem, strong bonds with the students, and a feeling that she was helping them and making a difference. Glen stated that the workplace was nice, but he did not express the same passion about his work. In fact, Glen did not enjoy his previous paid work:

The key difference in my work as an analyst was that I worked alone. Now that I’m retired, I see it as completely different. I want to be less focused on small specific things that I work on alone as opposed to working with other people and being part of a social group of some kind and working with people, whether it is a group of kids or little kids or out on the trails, other groups. I still find being alone very important. But I like working with other people …. Teamwork, being part of a social work was missing from my previous work, especially in my last job. We didn’t even have meetings, we were very capable and didn’t need them, but we should have had more to make it more of a cohesive social group, I think …. (Glen)

In comparison, Marie was very passionate about her work:

I loved my job. Now having said that, you know the bureaucracy and red tape and new things coming in. You just deal with them as they come in…I was head of 3 departments. So I loved my job. It was very good [for my self-esteem], very good. It was challenging [work]. That’s what you want in a job. (Marie)

Marie and Glen had differing experiences in their retirement process: Marie went through an emotional process of retirement that took approximately a year to work through, and it was
more complex because of her move and her worry, followed by mourning, over her mother;

Glen’s transition to retirement involved a solitary athletic adventure. Marie stated:

I retired in June, 2003. The actual retirement was great because they had lots of parties and everybody was well wishing and that, but right after the retirement, there’s a big hole there. Mind you, it was the end of June. You are used to having the summer off. But in that summer we sold our house, and we prepared to move, and which was too soon. I think my retirement probably wasn’t planned well. I didn’t plan what I was going to do after. I just thought okay now it’s over. Now I can enjoy life. But you have to make plans on how you are going to enjoy life. And we did everything a bit too fast. I had a lot of trouble when we first moved down here with depression and just so unhappy, because my mother was still back in Pickering. Anyway, it has evened out and I’m to the point now where I’m quite happy. But I think, right after retirement, there is a hole there because you’re no longer in the workforce. You’re no longer meeting people every day. You’re no longer ‘productive.’ You’re no longer contributing to society. This is what goes through your mind. The other side is you’ve got all this time now, with an income, fixed as it is, but an income. And you can start doing things that you always wanted to do. (Marie)

Glen said:

I had a lot of friends who retired. And some of them said make a clean break and do something intensively for 2 or 3 months and then come back and build your life again. And, so I got on my bike and went to Calgary and back. So that took 3 months. That was from June until the very last day of August. (Glen)

Marie’s paid work skills and knowledge were transferred into her volunteer activities and she used them within several organizations:

I think dealing with needy people, maybe, being able to talk to people, with compassion and whatnot. And when you’re teaching, as you know, especially with special-education kids, they are very needy. And it’s the same as when you
go on the crisis line ... the same as a lot of students who have problems, they need someone to talk to. Oh, absolutely, teaching has probably helped me a lot and still is in my everyday life as well. And over at the [heritage] house, even.... I’m a people person, even though I don’t make friends, I love talking to people. And I think that was probably nurtured in teaching, and it carries on. And dealing with the seniors, it’s the same thing, their needs. It’s being able to deal with people with more needs than the average person maybe. Is that a way of putting it? That has a lot to do with it. I’m sure the teaching had a lot to do with it .... And even dealing with crises, things like that ... with the crisis line. Absolutely! [Problem solving skills] It’s a matter of breaking down a problem step by step and that’s what you do. (Marie)

Glen did not experience the same degree of transference:

Definitely in the board [work], in the financial [work], some of the [knowledge] has come over. Being able to deal with that in a business environment. Those things obviously have helped and also the knowledge of financial systems. That came from the business degree, and then working in financial systems there’s some cross over there … the problem solving. That was part of the previous job. That comes also from previous volunteer work. It fed back the other way. I think that volunteering stuff while I was working, the development of new skills fed back the other way sometimes. (Glen)

Glen recognized that he did not transfer a lot of his skills and knowledge and he added:

The [skill and knowledge] transference.... I think there are people who really don’t want the transference. Some people have gone in and done exactly the same [as me]. One guy, he was a lawyer and he went back and did an art history degree and now for one of his volunteer jobs he volunteers at the art gallery and he does tours of the art gallery and goes into the schools occasionally. [It’s] the same kind of thing, for him it is a complete change (Glen)
One similarity between Marie and Glen is that they both volunteered with multiple organizations and they brought a lot to their volunteer commitments. Furthermore, they also got a lot of self-esteem back from giving to others. Marie said:

The [long-term care staff member] asked if [I’d] mind going over on Wednesday afternoons to call bingo …. [I] do crafts or we have games night …. [I] play cards with this group of people, do this, do that, go on a bus trip …. All the people say ‘Hi, [Marie]’ when I go in. They all know me. Even the old men and there’s very few of them, but they kind of keep to themselves. But they know me and they all say hello. I just get so much back from those people. They are always so pleased to see me and that has got to be a real ego boost. No matter how you cut it …. [During] the bingo game, I joke around with them when we’re calling bingo and we have banter back and forth …. I put on my outfit [from the heritage] house one day and went over there and I didn’t tell the residents – the staff knew. I went straight into the kitchen. It was lunchtime and I started taking the trays in to hand them lunch at the tables. The [Residents] were just blown away. They thought that was wonderful. They thought that was great. (Marie)

Glen said:

[My talent] came from university and it was also important at work …. [While doing] teamwork in the finance committee or board work [volunteering] … one of my strengths is to sometimes summarize what people do or come up with when we have discussion over an issue, [I] come up with either a summary, and this is why I like chairing meetings cause I don’t have to get involved in the discussion very much but I like to come up with either a summary or see where a solution might come out of the discussion …. [I] let them take [my proposed solution], then improve on that. In a sense it seems like I’ve come up with an original idea but often it’s just being able to do a lot of listening and put things together …. I have the fundamentals of understanding all these issues that are talked about …, but I really try to listen to what the discussion is when I’m chairing it …. If I have an idea of how to move it to another stage, I’ll do that. The ideas come to me. But
I know they are not unique to me because I hadn’t thought about them at the beginning, I only thought about them as I saw them, as I saw their discussion and it formed inside me somehow. It is problem solving. I hope it is a talent that I have. Problem solving was part of my previous job. It also comes from previous volunteer work. (Glen)

Glen’s retirement transition and the extent that his skills and knowledge are transferred to his volunteer activities are important to consider, as they are very different from the experiences of the other participants.

**Discussion**

These twelve participants were highly dedicated and committed volunteers who contributed at least three hours per week to their volunteer activities. They were an altruistic group of individuals who were striving to help others during their leisure time. They wanted to give back to their communities and this finding is consistent with other findings (Chappell & Prince, 1997; Savishinsky, 2004). The participants were all vital, active and engaged in their communities. Over a year, three hours per week could equal 156 hours of volunteer contributions. The other nine participants were contributing a lot more than three hours per week, and would be among the top quarter of those contributing 171 hours per year, described by Hall et al. (2009) as top volunteers. The participants who were contributing 20 to 40 volunteer hours per week would be outliers among this group of top volunteers.

Donald Super’s life-span, life-space theory of career development (Super, Savickas, & Super, 1996) was used as a framework for exploring volunteering among retirees. Super et al. view retirement as a stage of career development. The focus of this case study was to investigate the connections between previous paid work and unpaid volunteer work and how this impacts retirees’ career self-concept during retirement. Skills, abilities and knowledge appear to be
transferred from paid work to volunteer activities for the vast majority of participants. However, it is important to see whether the findings from this small sample are found among a larger sample of retirees. There is also evidence of the transference of contextual factors and this finding indicates that the idea of contextual connections to previous paid work is worth exploring in the next phase of the study.

Cognitive stimulation, learning, and being mentally active were important to the participants. They were interested in lifelong learning through their volunteer activities. They described ways in which they continued to learn new things and be mentally challenged. For example, three of the participants explained how they were learning new things about seniors and aging, and how to interact with the elderly. At first, this learning was not intentional for two of these participants, but it was rewarding and it engaged them.

Recent research indicates that doing intellectually stimulating leisure activities is related to increased cognitive functioning (Schooler & Mulatu, 2001). Schooler and Mulatu state that the most intellectually complex type of activity is “problem solving involving dealing with people, or unpredictable or obstinate things, with moderate degree of empathy, insight, or ingenuity” (p. 469) and those requiring a high degree of insight, originality, or thought. Participant 11, Glen, provided a good example of this when he described his role as chair above.

Of all the participants, Participant 5 expressed concern over maintaining mental functioning and avoiding retirement most forcefully:

I don’t want to retire. I don’t believe that people keep their mental facilities if they retire. I never have. Everybody I’ve seen retire young intellectually and mentally lost agility. I haven’t seen a case where that didn’t happen. Maybe that’s my bias or something …. I would never retire unless [I lost my] health or I lost my way. Why retire?
The participants provided some examples of informal self-directed learning and incidental learning, and a few examples of continuing adult education, including volunteer training, were given as well (Livingstone, 2008; Schugurensky, 2000). Some of the participants had learning experiences that were not intentional; however, examples of learning were identified and discussed, and learning experiences also came up during other parts of the interview. Hence, there was a general awareness of learning (Schugurensky, 2000). Nevertheless, when asked about their opportunities for learning, many had trouble describing their learning experiences and giving examples. The wording of the question or the question itself may have confused them because the interview question asking about opportunities for learning may have made the participants think about formal education. Or perhaps many experienced incidental learning and had not given it much thought. Overall, this question did not elicit as many examples of learning as expected, although some good examples of learning were elicited. The research literature indicates that little exploration of lifelong learning and volunteering has been conducted and this is an important area that will be explored further in Phase 2. Phase 1 generated additional questions about learning through volunteering. If older adults want to learn new things through their volunteer activities, what are their learning goals? If older adults want to learn something new, how do they accomplish this if they are doing volunteer work that uses the same skills, abilities, and knowledge as their previous work?

Career self-concept was also examined. Not only does career self-concept change over time, but the participants’ recollection of their sense of self prior to retirement was used to examine this concept. While all of the participants recalled details about their previous careers and their sense of self prior to retirement, they might not accurately remember how much of their sense of self used to be due to their career self-concept. This was a limitation of the Phase 1 case
study. Nevertheless, there is evidence that the participants’ volunteer roles have grown in importance during their retirement. These roles are providing renewed meaning in the participants’ lives; hence, the roles seem to have filled a void left by the ‘end of work’ and become incorporated into the participants’ sense of self, providing self-esteem, cognitive stimulation and social interaction. Since the majority of retirees felt that their skills, abilities and knowledge had been transferred from their paid work to their volunteer activities, and since skills and abilities are an important component of career self-concept, these findings support Super et al.’s theory that volunteering can be seen as a continuation of the career trajectory of retirees.

The transition to retirement was different for the twelve participants. Some experienced a difficult transition, whereas others stated that their transition was smooth. Some participants, like Participant 8 planned for retirement in advance, giving it a lot of forethought and taking action or using agency (Chen, 2006; Giele & Elder, 1998; Marshall, 2005). She had expectations for her retirement and she wanted them to be realized. Some participants, for example Participants 1 and 3, became involved in volunteering serendipitously through a chance request for help from nonprofit staff (Chen, 2005).

The life course perspective indicates that there are connections and linkages between previous events and experiences and current ones. Using this perspective, the volunteer experiences of the retirees can be viewed as a continuation of their career trajectories and a continuation of their life course. For example, the decisions made in youth to pursue a certain line of work will not only influence level of pay and lifestyle; they may influence the type of volunteering during the later years of life. The participants each described life themes. The life themes provide a sense of meaning and fulfillment for each participant; these themes create a sense of coherence, integrity and identity. These life themes are confirmation that there are
trajectories or pathways throughout life and this highlights the importance of using the life course perspective as a framework for this research. Furthermore, this illustrates Super et al.’s (1996) description of how the self as ‘I,’ abilities, interests, values, and choices come together to create a life history, which reveals an individual’s uniqueness and purpose in life.

Participant 11 did not enjoy his paid work and felt a small amount of his skills and abilities were transferred to his volunteer activities, perhaps because he consciously sought out very different, more socially-focused volunteer activities. His experience was important because it highlighted how some retirees might not enjoy their paid work. It was important that the survey include retirees who did not like their paid work in order to better understand their use of skills, abilities, and knowledge in their volunteer activities and whether this impacts their career self-concept. This participant’s experience was taken into account during the refinement of the Phase 2 survey.

From the life course perspective, there was evidence of linked lives where participants with partners tended to retire around the same time (Settersten, 2003). In addition, the lives of participants were linked to the social and political context in which they were living, with one participant retiring because of mandatory retirement legislation (Giele & Elder, 1998) that has since been eliminated in Ontario, the location of this study. There was also discussion of different generations’ experiences or perspectives on retirement, with these participants desiring a retirement different from that of their parents, the previous generation.

The range of occupations and the fact that most of the participants had at least some university or college education concurs with Choi’s (2003) and Tang’s (2008) findings that workers with higher levels of education, namely those in professional, sales and service jobs, were more likely to volunteer than those in manual or trade jobs. This could be due to a lack of
leisure time amongst trade’s people while they are in the paid labour force, and perhaps the trajectory or pathway that is maintained during later life stages, such as during retirement. Older individuals currently working within the trades and retired from the trades can contribute much to their communities, highlighting the need for public policy to address the issue of their apparent lack of involvement in volunteer activities.

Most of the participants volunteered prior to their retirement, while they were in the paid labour force. Most of them were interested in volunteering relatively consistently during their lives and actively maintained their citizen roles (Super et al., 1996). This finding resonates with the life course perspective (Settersten, 2003) and highlights how individuals continue on a trajectory throughout their lives.

The participants received a lot back from the volunteer activities they engaged in. Their activities provided social interaction and a new circle of friends, and boosted their sense of self-esteem through an opportunity for personal accomplishment. In addition, they felt good about giving back to their communities.

Previous research indicates that the motivations to volunteer across the life course vary (Chappell & Prince, 1997) and may follow the stages of Erikson’s (1974) theory of psychosocial identity development (Boling, 2005; Erikson, Erikson & Kivnick, 1986; Harvard School of Public Health, 2004). Do retirees who volunteer have an identity development that is different from the rest of the population? What identity needs are middle-aged and older people seeking during this time and is their volunteering providing them with developmental benefits and ‘advantages’? What are their needs if they are dedicated volunteers? Future research needs to address these questions.
Retirees choose different later life activities and only some retirees pursue volunteering during their discretionary time. Some retirees remain engaged in paid work, either part-time or full-time and continue to make a contribution within the marketplace. Some retirees are able to combine paid work with volunteering and this also offers avenues for fulfillment. Research indicates that personality characteristics influence how retirees view their retirement and their participation in volunteer activities (Hooyan & Kiyak, 2002; Moen, Reis & Morros, 2002), although it may also be due to human agency, opportunities and chance (Chen, 2005; Chen, 2006). The participants spoke a lot about retirement providing them with the freedom to choose their volunteer activities and this finding creates questions about the extent to which their volunteer activities are the product of planning and using agency or are serendipitous in nature.

Older adults are a human resource with a wealth of skills, abilities and experiences that can be used within their volunteer work. Older adults also have learning and personal development needs and financial needs, all of which must be balanced with community needs. Despite the competing demands on their discretionary time, society will benefit no matter where they decide to devote their time and energy. This view coincides with one theory from the field of gerontology, namely Morrow-Howell and her colleague’s (2004) description of productive aging. Although this perspective promotes older adults as contributors to society, rather than economic drains (Rozario, 2007), some people might take offense to the emphasis on the term ‘productive’ and the underlying assumptions that productivity is important; however, the retirees in Phase 1 also emphasized their desire to be productive during their retirement. In the interviews, they felt that this represents a change in attitudes and values on their part when compared to previous generations. The life course perspective states that individuals construct their own individual life course through their choices and actions, within the constraints of social
and historical circumstances (Giele & Elder, 1998). One explanation for the participants’ view that they are different from previous generations of retirees is that their life expectancy is much longer, prompting them to remain active and engaged. Also, there is evidence that baby boomers are diversifying their volunteering more than previous generations away from a focus on religious organizations, to other nonprofits (Corporation for National and Community Service, 2007).

In seeing themselves differently from previous generations and striving to be different, the participants are trying to modify society’s commonly held norms and expectations regarding retirement. They spoke about how they want to be seen as active and involved during their retirement, suggesting that this generation is creating a new trend in retirement – the new retirement, where retirees are active and engaged in their communities. The participants saw themselves as vital, active and productive individuals. A couple of participants stated that they felt the terms retirement and community volunteer should be changed or adjusted to reflect this image of the new retirement they were molding and embracing. Here, the participants agreed with Collins’s (2003) call to redefine retirement.

Is volunteering during retirement a new ‘career’ for some retirees? It depends on one’s perspective. Perhaps it is a new career for those individuals who are putting in 20 or more hours of volunteering a week, which is the amount some of these participants were contributing.

An effort was made to obtain a balance of paid occupations as well as a mix of men and women and geographic variability in the sample. However, these participants were all middle class, Caucasian and educated. One participant completed teacher’s college but did not have a Bachelor’s degree. This sample had approximately one-fourth of the participants in skilled or trade occupations. While it does not reflect Canadian diversity, other research has found similar
demographic patterns for occupations and education of volunteers (Choi, 2003), with educational and occupational status being predominantly middle class. This sample also lacked ethno-cultural and racial diversity; therefore, the results cannot be generalized to other groups in society. It does, however, help us understand the experiences of these retirees.

The life course paradigm points to structural changes (Giele & Elder, 1998), such as demographic change with our aging population, changes in government legislation and funding that affect nonprofit organizations, their recruitment and retention of volunteers, and government policy affecting retirees, as major impacts on an individual’s life trajectory that can influence their volunteerism. While these factors are beyond the scope of this case study, future research should explore how retirees who volunteer are experiencing these structural changes.

Conclusion

This Phase 1 case study demonstrates that volunteering during retirement can be viewed as a trajectory or pathway for the lives of individuals, one that, for the most part, is strongly connected to their previous paid work. This study found linkages between retiree’s paid-work skills, abilities, knowledge and work contextual factors and their volunteer activities. However, this case study had a small sample and these Phase 1 results cannot be generalized to a broader population. The findings regarding learning and self-concept require further exploration. Phase 1 fulfilled the goals to explore the issues in depth and to pilot questions for the Phase 2 survey.

The life course perspective highlights how each generation is unique from the one that came before. Previous research indicates that older retired adults are extremely dedicated volunteers who contribute large numbers of volunteer hours. Is there a potential to encourage more volunteerism among the current cohort of baby boomers who are retiring or soon to retire, by emphasizing paid-work connections? Is there a potential to better use the skills, abilities and
knowledge of current retirees who volunteer? Future research needs to address these issues to help inform public policy and public dialogue.

The current case study has provided insight into the extent of the connection between paid work and volunteer activities among a sample of retirees. Given the promise of using the life course perspective in combination with life-span, life-space career development theory, future research should examine other aspects of Super et al.’s (1996) theory while integrating the life course perspective.
Chapter 6: Phase 2 Survey

“I’m getting old, but I’m not there yet….” (Myles, 2006, Track 5)

"There can be no joy of life without joy of work." Thomas Aquinas

The Phase 2 survey was developed based on the Phase 1 case study and was used to further investigate the research questions. While the Phase 1 case study indicated that volunteer activities can be an extension of one’s previous paid work, it had a small sample size and the results cannot be generalized to a broader population; the Phase 2 survey attempted to verify these findings with a broader sample. This chapter will explain the development of the survey, the piloting of the survey, and the survey methodology. It will also present the participants’ characteristics and the results of the survey.

Development of the Survey Instrument

As a first step in this developmental mixed methods study, open-ended and exploratory interviews were conducted in Phase 1 with 12 retirees who were volunteering, in order to investigate five research questions. The findings from Phase 1 informed the design of the Phase 2 survey. As previously stated, the five questions in Phase 1 were:

1) To what extent do retirees use the skills and abilities that they developed through their paid work experiences in their volunteer activities?

2) Do retirees use the knowledge that they developed through their paid work experiences in their volunteer activities?

3) Are the contexts of retirees’ paid work and their volunteer activities similar?

4) What learning opportunities have retirees had through their volunteer activities?
5) Do retirees’ career self-concepts change from those they developed during their paid work careers, once they are engaged in later-life volunteer roles?

To summarize, although a small sample was used in the case study, the findings from Phase 1 demonstrated that skills, abilities, knowledge and contextual factors were transferred from previous paid work to volunteer activities. Learning through volunteer activities and career self-concept were also explored in the Phase 1 study; however, the findings from Phase 1 were not definitive in these two areas. Therefore, these concepts were further investigated, with Phase 2 providing a deeper examination of openness to learning, learning goals and career self-concept using new items developed based on the interview findings. The focus taken in the survey is on whether retirees had learning goals and what kind of goals they had. The refined research question on learning, which is research question 4, asked:

4) What learning goals do retirees seek to fulfill through their volunteer activities?

The participants in Phase 1 spoke about their career self, their volunteer activities and their skills, abilities and knowledge. Their utilization of their skills, abilities and knowledge seemed to be related to whether they liked their pre-retirement job or not. They also discussed retirement and the freedom it provided, their discretionary time without their regular work routine, and the community need for volunteers. The sense of freedom to choose their volunteer activities created questions about how they chose their volunteer involvement; what factors influenced them? These two additional research questions were developed for investigation in the Phase 2 survey:

6) What factor most contributed to retirees’ choice of volunteer activities?

7) Are retirees’ career self-concepts related to the use of skills, abilities and knowledge in volunteer activities?
The survey questionnaire (see Appendix E) was developed based on the literature review, adaptation of existing scales and the findings of the Phase 1 study, with items tapping each of the research questions. Table 6.1 outlines how each research question was examined in Phase 1 and Phase 2.

Table 6.1

*Research Questions and Items Tapping Each One in Phase 1 and Phase 2*

<table>
<thead>
<tr>
<th>Research Question</th>
<th>Concept Tapped</th>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>RQ 1</td>
<td>Skills</td>
<td>General, open-ended question about the skills and abilities used in previous paid work and volunteering</td>
<td>Specific skill sets examined through items listing a series of skills and abilities used in previous paid work and volunteer activities</td>
</tr>
<tr>
<td>RQ 2</td>
<td>Knowledge</td>
<td>General question about the knowledge used in previous paid work and volunteering</td>
<td>Items on whether their volunteer activities used knowledge from their paid work; the specific type of knowledge that was used and the most useful knowledge, skills, values or attitudes from previous paid work used in volunteer activities</td>
</tr>
<tr>
<td>RQ 3</td>
<td>Contextual Factors</td>
<td>General question about client population and physical work location, comparing paid work and volunteer activities</td>
<td>Two close-ended questions about client population and physical work location</td>
</tr>
<tr>
<td>RQ 4</td>
<td>Learning</td>
<td>General question about opportunities for learning and personal development through volunteer activities</td>
<td>A 5-item scale on openness to learning and an open-ended question on learning goals</td>
</tr>
<tr>
<td>RQ 5</td>
<td>Choice of Activities</td>
<td>Question about how they chose their volunteer activities</td>
<td>One close-ended question on conscious use of paid work skills in volunteer activities; one close-ended question on planning activities versus serendipitous opportunities; one close-ended question on whether someone being asked to volunteer</td>
</tr>
<tr>
<td>Research Question</td>
<td>Concept Tapped</td>
<td>Phase 1</td>
<td>Phase 2</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>---------</td>
<td>---------</td>
</tr>
<tr>
<td>RQ 6</td>
<td>The Self</td>
<td>Request to describe ‘Who you are’ as if you are meeting someone new</td>
<td>A series of questions about the ‘self’ and a scale on career self-concept</td>
</tr>
<tr>
<td>RQ 7</td>
<td>Career Self-Concept</td>
<td>Not Applicable</td>
<td>The career self-concept scale was used in conjunction with the questions on skills, abilities and knowledge to investigate Research Question 7</td>
</tr>
</tbody>
</table>

The literature and Phase 1 findings indicated that specialized knowledge and contextual factors were both important, and in the survey, participants were asked if they volunteered with a similar population and in a similar location. They were also asked to name and identify knowledge connections in previous paid work and volunteer activities in the survey. While skills, abilities and knowledge are related, skills and abilities can make use of specialized knowledge, and knowledge is a separate construct. Contextual factors such as the work site, the community, a regular routine, or a specific population are all important characteristics. Based on the Phase 1 case study, it was felt that they may play an important role in the connections between previous paid work and volunteering.

Opportunities for learning are related to striving to do something new within volunteer activities. Based on the results of Phase 1, items on openness to learning and learning goals were new questions added to the survey for Research Question 4. A subscale consisting of 5 items on interest in and openness to learning was created, based on a measure of openness to new experiences (John et al., 2008). For example, one item in this subscale asks participants if they are curious about many different things. Participants were also asked directly if they had learning goals related to their volunteer activities. Additionally, an open-ended item asking participants to
specify and describe their learning goals was added to the questionnaire to more fully explore their desire for learning something new.

The Phase 1 case study indicated that career self-concept changed during the critical period of retirement from paid work and a new sense of self evolved over a few months. One question this led to was Research Question 7, whether those individuals with higher levels of career self-concept would be more likely to use their skills, abilities and knowledge in volunteer activities. The next section will describe the development of an instrument to measure the construct of career self-concept, including defining the construct, developing items that measure it, testing the items and determining the best model for career self-concept.

The process of item development for career self-concept. As mentioned previously, career self-concept is a very complex construct and is defined in this study as how much one’s personal self-concept depends on one’s work. It includes conceptions and understandings of the self relating to paid work, career or occupation. Further, career self-concept includes not only the subjective self, but also the objective self or conceptions of the individual formed by observers that influence conceptions about the self based on feedback from others (Super et al., 1996). To clarify, career self-concept includes identifying with work and the work role, the enjoyment of work, and the importance of work within life (or work role salience), and is manifested in individuals possessing abilities and skills, and knowledge used in paid work.

In the knowledge-driven economy, knowledge from paid work is particularly important (David & Foray, 2002; Laroche, Mérette & Ruggeri, 1999; OECD, 1999). The economy and economic growth have increasingly become driven by knowledge-based activities and knowledge is equated with competitive advantage (Bouchard, 2006). Human capital encompasses skills, abilities, talents and knowledge (Laroche et al., 1999). Super et al. (1996)
did not include knowledge in the development of career self-concept, but this may be an important element for the career self-concept of retirees, particularly during the Knowledge Age that we are in (OECD, 1999). Hence, an item to measure this will be included in the survey.

Table 6.2 outlines this construct, its levels and their definitions.

Table 6.2

<table>
<thead>
<tr>
<th>Level of Career Self-Concept</th>
<th>Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>High level of career self-concept</td>
<td>An individual with a high level of career self-concept is someone with many skills, abilities and career-specific knowledge. He or she enjoys work a lot, and has a strong sense of self in relation to paid work. Work is extremely important.</td>
</tr>
<tr>
<td>Medium level of career self-concept</td>
<td>An individual with a medium level of career self-concept is someone with some skills, abilities and career-specific knowledge. He or she has a moderate amount of self-concept derived from paid work. Work is enjoyed and is important, but not extremely so.</td>
</tr>
<tr>
<td>Low level of career self-concept</td>
<td>An individual with a low level of career self-concept is someone with few skills and abilities and little career-specific knowledge. He or she possesses little sense of self in relation to paid work. In fact, work may not be at all important to this person’s sense of self; other roles are more important.</td>
</tr>
</tbody>
</table>

**Related constructs.** It is important to recognize that there are several other constructs that are related to career self-concept; these include identity, self-efficacy, self-worth, self-image, and self-esteem. These constructs have been examined in the literature from different theoretical perspectives and were explored in Chapter 3.

Another related concept, the idea of role salience, is essential in life-span, life-space theory (Super, 1990; Super et al., 1996) because the importance of work may change over time, across the life course. Super et al. designed a Work Salience measure, but it does not investigate career self-concept (Osborne, Brown, Niles & Miner, 1997). Super et al.’s theory posits that individuals differ in the importance that they assign to work in their lives. Work can become more or less important at different periods in an individual’s life. The survey instrument should
distinguish between people with a strong work ethic who place great importance on their work role and those who do not emphasize work in their lives. This is an important consideration, especially because the Phase 1 results indicate that skill, ability and knowledge use differs for those individuals who do not enjoy their work.

**Measuring career self-concept.** Super et al. (1996) used ability and interest tests, value appraisals, the life-role salience inventory and career maturity using the career development index to investigate career adaptability. These measurements do not tap career self-concept and a measure had to be designed.

The Phase 1 qualitative interviews and results informed the construct map for career self-concept, including the item design, in several ways. First, results of Phase 1 suggest that there is a continuum of career self-concept. Higher levels of career self-concept appear to be related to higher use of paid work skills, abilities and knowledge within volunteer activities. In the Phase 1 case study, Participant 11 reported that he did not enjoy his work and he transferred a low proportion of his skills and abilities to his volunteer activities. The other participants reported transferring a moderate to high proportion of their skills and abilities.

Appendix F provides a list of the 16 items that were developed to measure career self-concept and how they were hypothesized to be related to the levels of the construct shown in Table 6.2. In a small pilot study, these items were administered in paper and pencil format to 32 participants; these participants were a convenience sample of graduate students and family members, including 5 retirees. The responses were analyzed using an item response theory model, the partial credit model, implemented in the ConstructMap software (Bear Center, 2009; Wilson, 2005). These results are in Appendix G. Appendix H has the Construct Map for the 16 items in the pilot study.
Based on the pilot study results, the wording of some items was made clearer and several items were dropped. For example, “I have many roles in life which are more important to me than my paid work role was” was changed to “When I was working, I had other roles in life that were more important to me than my paid work role was,” and “My family and friends are the most important things in my life” was changed to “My paid work was the most important thing in my life.” “I was always thinking about my paid work, even when I was not there” was deleted. “I know what my goals are in life” was deleted because it appears to lie outside the construct. The two learning-related items were moved to the openness to learning scale. “I recognize my talents and skills” was deleted because participants had to identify and contrast the skills they were using in their paid and volunteer work in another section of the survey. “I identified myself with my paid work before I retired” was deconstructed into three items, one being “I mostly think of myself as a retiree from paid work or occupation,” which directly asks this question, and two items tapping career-related self-esteem, which is closely related to career self-concept: “My success in my paid work was important for my self-esteem” and “I took pride in my work.” After these modifications, the scale was reduced to 10 items (see Appendix I), with three items maintaining their original wording: “I put pressure on myself to be successful at work,” I did not enjoy my paid work,” and “My paid work was fulfilling.” A new Construct Map was created; it is provided in Appendix J.

**Survey Questionnaire Development**

To make the survey easy for older adults to fill out, careful instructions were provided and a 12-point font was chosen. The on-line instructions included information specifically designed to assist older adults such as how to increase screen font size and what to do if you hit the back button accidentally. Items were formatted to enable participants to complete the skills
and abilities question for paid work and volunteer activities together. In advance of the survey, the survey items were piloted with 12 retirees who volunteered and were reviewed with assistance from my thesis supervisor and thesis group. This was done to determine readability and comprehension of the items, suitability of the language used, and the length of time required to complete the questionnaire. This was time consuming; however, adjustments to the survey’s wording, formatting and length were made based on important feedback from the pilot.

After piloting the survey, edits and changes were made to several sections because the survey instrument was too long. For the on-line survey, prompts which indicated how far along participants were in the survey were added. On the paper survey, instructions that led participants through the survey questions were bolded.

**Coding**

There were several open-ended items in the survey. These investigated the desire to use skills and abilities other than those they were currently using, the type of knowledge they were using, their career-self concept, and their learning goals.

**Knowledge types.** Participants were asked if they used knowledge from their paid work in their volunteer activities, and these open-ended responses were read, looking for trends in the data. Types of knowledge were categorized into 20 types that emerged from the responses (see Appendix E).

**Learning goals.** Through an open-ended item, the participants were asked to describe any goals they had related to learning something new through their volunteer activities. The theory on the five dimensions of learning was used to classify participants’ goals. Evidence of each of the five dimensions of learning was sought in coding the responses. Some of the retirees
had complex learning goals; however, all of the goals were classified along one or multiple dimensions of learning.

**Career self-concept.** Changes in career self-concept were assessed by asking participants to describe their sense of self the year before they retired and again in the present. Participants were asked to recollect their thoughts on their career self-concept during the year before they retired. These open-ended responses were read and examined for trends. One item asked participants to describe “Who Am I” during the year before their retirement. First, this item was coded on whether there was a career self-concept present or not, to determine if the work role was a part of their sense of self. Then, the item was further coded using Super’s (Super et al., 1996) roles: child, student, leisurite, citizen, worker and homemaker, with the child role being eliminated and the homemaker role changed to a family role. This was a way of assessing the presence of other roles or selves within the self as a whole (see Appendix E). Responses to the question “Who Am I Now?” were coded on whether the paid work self (worker), the volunteer self (citizen), the retired self (retiree), or a combination of volunteer and retired self was present in these responses. If there was no evidence of any of these roles, then the response was coded with the leisurite, student or family role, as applicable. For the question “What do I do?” the volunteer self/role was coded on whether or not it was present. The item “How Others See Me” was coded for the presence of a paid-work self, a volunteer self, or another type of self.

**Sample**

Survey participants were age 55 to 75, retired within the last 10 years, and volunteering an average of 3 hours per week. The principal sampling frame was retired persons who volunteered in a nonprofit organization affiliated with a volunteer bureau that was part of Volunteer Canada, and the invitation to participants was distributed through the volunteer bureau.
membership. The first call to participate was sent out to all 64 affiliated volunteer bureaus across Canada. Through them, a broad invitation to take part in this study was sent out to nonprofit organizations across the country, and retirees who were currently volunteering were invited to contact me if they were interested in participating in the survey. Information about the survey was also shared with several research centres across the country. Subsequently, specific organizations that might have older volunteers were contacted. These included the Diabetes Society, the Alzheimer’s Society of Canada, Meals on Wheels, the Canadian Cancer Society, Baycrest, the Rose Theatre and William Osler Health Centre. Finally, three retirees’ associations – The Retired Teachers of Ontario, Nortel Retirees Association, and Region of Peel Alumni – were contacted. Three hundred and twenty-five emails were then sent out to the individuals who indicated an interest in the survey. In addition, paper copies of the survey were requested by 6 organizations and 5 seniors directly. A total of 56 paper copies were mailed out to those requesting them, and of these, 12 were completed. In total, 219 participants completed the survey (207 of these completed it on-line and 12 in paper format). An additional 24 participants started but did not finish the on-line survey, and therefore they were eliminated from the survey sample. Of the 219 who completed the survey, 5 participants were eliminated from the sample because they did not meet the age or retirement criteria. The final sample consisted of 214 Canadian retirees.

Table 6.3 contains demographic information for the survey participants. Most of the survey participants (57%) were retired women; 43% were retired men. Participants were between the ages of 55 and 75, with a mean age of 64. The median age was 64 and the mode was 62.

Almost a third of participants indicated that they were immigrants to Canada. Eight percent of the Phase 2 survey participants identified themselves as members of diverse ethno-
cultural groups including Black, East Indian, West Indian, Chinese, Filipino, Muslim, Jewish, French, Aboriginal and French-Aboriginal. Other participants self-identified as being Canadian, or having European ancestry. Some of the ethno-cultural backgrounds reported by participants were British, Irish, Russian, German, Polish, Ukrainian, and American.

The majority of the participants were either married or living common-law (73%). In addition, 11% were divorced, 10% were widowed, 5% were single and never married, and 1% was separated. Seventy-two percent of participants were fully retired, with approximately 13% stating they were semi-retired, and about 3% indicating they were retiring gradually. An additional 8% were retired and working. Approximately 4% classified themselves as ‘other’ and were retired from second careers; some of these participants continued to work part-time.

The number of organizations where participants volunteered ranged from 1 to 12, with most of the participants volunteering at 1 (24%), 2 (24%), or 3 (26%) organizations. The mean number of organizations volunteered at was 2.88. The median was 3 and the mode was 3. Participants volunteered with a variety of organization types. The top five organizational types reported by participants were: social services (48%), community groups (31%), religious (30%), senior’s groups (20%) or arts and culture organizations (19%).

Many participants were long-time volunteers, with 23% volunteering for more than 30 years. An almost equal percentage (20%) volunteered for five to nine years. Seventeen percent volunteered for three to four years and 15% volunteered for ten to fourteen years. Nine percent of participants had volunteered for two years or less.

As shown in Table 6.3, the participants have a high level of formal education, with only 9% not having any post-secondary schooling. Similarly, the participants appeared to have
relatively high household incomes relative to Canadian norms, with 22% at $100,000 or greater.

Eleven participants did not provide information on household income.

Table 6.3

<table>
<thead>
<tr>
<th>Demographic Characteristic</th>
<th>Phase 2 Survey (N = 214)</th>
<th>CSGVP (N = 3,247)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency</td>
<td>Percentage</td>
</tr>
<tr>
<td>Sex</td>
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<td></td>
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<tr>
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<td>Male</td>
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<td>Marital Status</td>
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<tr>
<td>Divorced</td>
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<tr>
<td>Widowed</td>
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<tr>
<td>Single, Never Married</td>
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<tr>
<td>Retirement Status</td>
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<tr>
<td>Fully Retired</td>
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<td>Semi-Retired</td>
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<tr>
<td>Retired and Working</td>
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<tr>
<td>Other</td>
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<tr>
<td>Education Level</td>
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<td>Some High school</td>
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<tr>
<td>High school</td>
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<tr>
<td>Some Post-Secondary</td>
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<td>12.1</td>
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<tr>
<td>Post-Secondary Diploma</td>
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<tr>
<td>University Degree</td>
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<td>65.5</td>
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<tr>
<td>Birthplace</td>
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<tr>
<td>Canada</td>
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</tr>
<tr>
<td>Outside Canada</td>
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<td>30.8</td>
</tr>
<tr>
<td>Province</td>
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<td></td>
</tr>
<tr>
<td>Newfoundland &amp; Labrador</td>
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<td>0.5</td>
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</table>
### Demographic Characteristic

<table>
<thead>
<tr>
<th>Demographic Characteristic</th>
<th>Phase 2 Survey (N = 214)</th>
<th>CSGVP (N = 3,247)</th>
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<tr>
<td></td>
<td>Frequency</td>
<td>Percentage</td>
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<td>Prince Edward Island</td>
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<td>2.3</td>
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<tr>
<td>New Brunswick</td>
<td>10</td>
<td>4.7</td>
</tr>
<tr>
<td>Quebec</td>
<td>5</td>
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<tr>
<td>Ontario</td>
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<tr>
<td>Manitoba</td>
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<td>0.5</td>
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<td>Saskatchewan</td>
<td>3</td>
<td>1.4</td>
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<td>Alberta</td>
<td>6</td>
<td>2.8</td>
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<tr>
<td>British Columbia</td>
<td>43</td>
<td>20.1</td>
</tr>
<tr>
<td>Yukon, Nunavut &amp; Northwest Territories</td>
<td>5</td>
<td>2.3</td>
</tr>
</tbody>
</table>

### Previous Industry

<table>
<thead>
<tr>
<th>Previous Industry</th>
<th>Phase 2 Survey</th>
<th>CSGVP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency</td>
<td>Percentage</td>
</tr>
<tr>
<td>Business, Finance and Administration</td>
<td>28</td>
<td>13.1</td>
</tr>
<tr>
<td>Natural and Applied Sciences, High Technology</td>
<td>9</td>
<td>4.2</td>
</tr>
<tr>
<td>Health care and Health Services</td>
<td>37</td>
<td>17.3</td>
</tr>
<tr>
<td>Education and Training</td>
<td>66</td>
<td>30.8</td>
</tr>
<tr>
<td>Government Service and Social Service</td>
<td>4</td>
<td>1.9</td>
</tr>
<tr>
<td>Law and Legal Services</td>
<td>24</td>
<td>11.2</td>
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<td>Arts and Culture</td>
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<td>.9</td>
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<tr>
<td>Sales and service</td>
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<td>5.1</td>
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<tr>
<td>Construction</td>
<td>4</td>
<td>1.9</td>
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<tr>
<td>Transportation</td>
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<td>Primary industries</td>
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<td>.5</td>
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<tr>
<td>Utilities</td>
<td>2</td>
<td>.9</td>
</tr>
<tr>
<td>Processing and Manufacturing</td>
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<td>2.3</td>
</tr>
<tr>
<td>Trades, Installation, Maintenance and Equipment</td>
<td>7</td>
<td>3.3</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
<td>4.7</td>
</tr>
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### Household Income

<table>
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<th>Household Income</th>
<th>Phase 2 Survey</th>
<th>CSGVP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency</td>
<td>Percentage</td>
</tr>
<tr>
<td>Under $20,000</td>
<td>8</td>
<td>3.7</td>
</tr>
<tr>
<td>$20,000 - $29,999</td>
<td>12</td>
<td>5.6</td>
</tr>
<tr>
<td>$30,000-$39,999</td>
<td>25</td>
<td>11.7</td>
</tr>
<tr>
<td>$40,000-$49,999</td>
<td>16</td>
<td>7.5</td>
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### Phase 2 Survey ($N = 214$) | CSGVP ($N = 3,247$)
--- | --- | ---
$50,000-$59,999 | 26 | 12.1 | 23.6
$60,000-$74,999 | 31 | 14.5 |
$75,000-$99,999 | 38 | 17.8 |
$100,000-$124,999 | 22 | 10.3 | 18.3
$125,000 or more | 24 | 11.2 | 0.0
Not stated | 11 | 5.1 | 0.0

### Religious Service Attendance
- Once a week: 81 (37.9%) | 43.7%
- Once a month: 15 (7.0%) | 15.6%
- 1 to 5 times a year: 35 (16.4%) | 19.4%
- Not at all: 82 (38.3%) | 21.3%


### Comparison to the General Population

The Canadian Study of Giving, Volunteering and Participating can be used to compare the Phase 2 survey sample to the broader population. The CSGVP had a representative sample of 20,510 Canadians 15 years of age and older, and the CSGVP–North surveyed a representative sample of 1,317 Canadians 15 years of age and older, in smaller, northern, and more dispersed communities (Statistics Canada, 2010b). The results for both surveys were combined for the CSGVP and the number of participants age 55 and older who volunteered was 3,247. In the CSGVP, women are slightly more likely to volunteer and volunteering increases with higher educational attainment and higher income levels. This is also the case with the Phase 2 survey. Both surveys had a large proportion of married participants. Approximately 31% of Phase 2 and
21% of CSGVP participants were born outside of Canada. Table 6.3 also provides a comparison of the two surveys.

The Results

Research Question 1: Skills and Abilities

Research Question 1 asked: Do retirees use the skills and abilities that they developed through their paid work experiences in their volunteer activities? This was investigated by examining whether the skills retirees used in previous paid work were used with comparable frequency – or at all – in their volunteer activities. As Table 6.4 indicates, managing people in previous paid work and in volunteer work were found not to be significantly related to each other, $\chi^2 (4, N=219) = 6.53, p = .163$. In further examining the findings, there appeared to be more opportunities to manage others in their paid work than in their volunteer work. Hence many participants who had management experience in their previous paid work were currently volunteering but not often using management skills.

Table 6.4

*Frequencies and Chi Square Statistics for Skill Use in Paid and Volunteer Work*

<table>
<thead>
<tr>
<th>Skill</th>
<th>Paid Work</th>
<th>Volunteer Work</th>
<th>$\chi^2$ for All Frequency Levels</th>
<th>$\chi^2$ for Never vs. Sometimes/Often</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Never</td>
<td>Sometimes</td>
<td>Often</td>
<td>Never</td>
</tr>
<tr>
<td>Managing people</td>
<td>19</td>
<td>56</td>
<td>111</td>
<td>79</td>
</tr>
<tr>
<td>Leading Others</td>
<td>12</td>
<td>51</td>
<td>130</td>
<td>55</td>
</tr>
<tr>
<td>Educating/Teaching</td>
<td>21</td>
<td>63</td>
<td>103</td>
<td>47</td>
</tr>
<tr>
<td>Training</td>
<td>14</td>
<td>90</td>
<td>77</td>
<td>60</td>
</tr>
<tr>
<td>Counselling</td>
<td>31</td>
<td>83</td>
<td>66</td>
<td>70</td>
</tr>
<tr>
<td>Mentoring</td>
<td>28</td>
<td>85</td>
<td>67</td>
<td>69</td>
</tr>
<tr>
<td>Legislating</td>
<td>133</td>
<td>23</td>
<td>5</td>
<td>148</td>
</tr>
<tr>
<td>Caregiving</td>
<td>107</td>
<td>36</td>
<td>21</td>
<td>100</td>
</tr>
<tr>
<td>Researching/Writing</td>
<td>52</td>
<td>73</td>
<td>50</td>
<td>91</td>
</tr>
<tr>
<td>Skill</td>
<td>Paid Work</td>
<td>Volunteer Work</td>
<td>$\chi^2$ for All Frequency Levels</td>
<td>$\chi^2$ for Never vs. Sometimes/Often</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------</td>
<td>----------------</td>
<td>----------------------------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Never</td>
<td>Sometimes</td>
<td>Often</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Never</td>
<td>Sometimes</td>
<td>Often</td>
<td></td>
</tr>
<tr>
<td>Administering</td>
<td>33</td>
<td>60</td>
<td>80</td>
<td>22.24***</td>
</tr>
<tr>
<td></td>
<td>60</td>
<td>88</td>
<td>60</td>
<td>26.34***</td>
</tr>
<tr>
<td>Organizing</td>
<td>13</td>
<td>46</td>
<td>128</td>
<td>24.60***</td>
</tr>
<tr>
<td></td>
<td>41</td>
<td>76</td>
<td>70</td>
<td>23.28***</td>
</tr>
<tr>
<td>Developing</td>
<td>33</td>
<td>68</td>
<td>70</td>
<td>41.58***</td>
</tr>
<tr>
<td></td>
<td>88</td>
<td>55</td>
<td>28</td>
<td>37.72***</td>
</tr>
<tr>
<td>Presenting</td>
<td>34</td>
<td>78</td>
<td>75</td>
<td>57.31***</td>
</tr>
<tr>
<td></td>
<td>67</td>
<td>73</td>
<td>47</td>
<td>38.87***</td>
</tr>
<tr>
<td>Selling</td>
<td>95</td>
<td>43</td>
<td>28</td>
<td>20.13***</td>
</tr>
<tr>
<td></td>
<td>108</td>
<td>48</td>
<td>10</td>
<td>24.82***</td>
</tr>
<tr>
<td>Serving</td>
<td>37</td>
<td>83</td>
<td>55</td>
<td>42.14***</td>
</tr>
<tr>
<td></td>
<td>24</td>
<td>88</td>
<td>63</td>
<td>42.49***</td>
</tr>
<tr>
<td>Analyzing</td>
<td>25</td>
<td>63</td>
<td>87</td>
<td>42.24***</td>
</tr>
<tr>
<td></td>
<td>75</td>
<td>79</td>
<td>21</td>
<td>38.05***</td>
</tr>
<tr>
<td>Creating</td>
<td>93</td>
<td>52</td>
<td>29</td>
<td>73.76***</td>
</tr>
<tr>
<td></td>
<td>29</td>
<td>43</td>
<td>25</td>
<td>60.85***</td>
</tr>
<tr>
<td>Operating</td>
<td>130</td>
<td>27</td>
<td>6</td>
<td>14.57**</td>
</tr>
<tr>
<td></td>
<td>130</td>
<td>24</td>
<td>9</td>
<td>214.00***</td>
</tr>
<tr>
<td>Engineering</td>
<td>143</td>
<td>12</td>
<td>8</td>
<td>23.78***</td>
</tr>
<tr>
<td></td>
<td>156</td>
<td>7</td>
<td>0</td>
<td>23.20***</td>
</tr>
<tr>
<td>Producing/</td>
<td>139</td>
<td>14</td>
<td>8</td>
<td>41.69***</td>
</tr>
<tr>
<td>Repairing</td>
<td></td>
<td></td>
<td></td>
<td>52.51***</td>
</tr>
<tr>
<td>Constructing</td>
<td>149</td>
<td>10</td>
<td>3</td>
<td>23.09***</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>25.50***</td>
</tr>
<tr>
<td>Other Skills</td>
<td>40</td>
<td>3</td>
<td>0</td>
<td>20.27***</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>40</td>
<td>14.64***</td>
</tr>
</tbody>
</table>

Note. The degrees of freedom for the $\chi^2$ for all frequency levels is 4 (except for the skills Engineering during Volunteer Work, and Legislating during Volunteer Work, for which no one selected Often and Other in Paid Work, for which no one selected Often). The degrees of freedom for the $\chi^2$ for Never vs. Sometimes/Often is 1.

*** $p < .001$. ** $p < .01$. * $p < .05$.

Chi-square tests of independence on all other skills were significant at the $p < .001$ or the $p < .01$ level. Because the interest was in whether or not retirees used these skill sets, the skills were also recoded and analysed according to whether they were used ‘ever’ or ‘never.’ Missing values were recoded as ‘never’ because participants did not select the skills that they did not use, but did select other skills they did use. After the recoding, chi-square tests of independence were significant for all skills at the $p < .001$ level.

A large proportion of participants used management and leadership skills in paid work. To provide additional analysis, chi-square tests of independence were conducted to determine if the relationship between skill use in paid work and in volunteer work were different for men and
women. Tables 6.5 and 6.6 provide the results; however, the cell frequencies for men were not big enough to conduct chi-square tests comparing men and women. When analyzing the management skill results separately for men and women, the results of the chi-square test were significant for women, indicating that the differences within women’s use of management skills were significant, $\chi^2(1, N=122) = 11.07, p < .001$. These results show that the women participants tended to use their management skills in their volunteer activities.

Table 6.5

*Frequency of Management Skills Use in Paid Work and Volunteer Activities*

<table>
<thead>
<tr>
<th>Gender</th>
<th>Management Skills in Paid Work</th>
<th>Management Skills in Volunteer Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ever</td>
<td>Ever</td>
</tr>
<tr>
<td>Male</td>
<td>Ever</td>
<td>36</td>
</tr>
<tr>
<td></td>
<td>Never</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>38</td>
</tr>
<tr>
<td>Female</td>
<td>Ever</td>
<td>64</td>
</tr>
<tr>
<td></td>
<td>Never</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>69</td>
</tr>
</tbody>
</table>

Table 6.6

*Frequency of Leadership Skills Use in Paid Work and Volunteer Activities*

<table>
<thead>
<tr>
<th>Gender</th>
<th>Leadership Skills in Paid Work</th>
<th>Leadership Skills in Volunteer Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ever</td>
<td>Ever</td>
</tr>
<tr>
<td>Male</td>
<td>Ever</td>
<td>61</td>
</tr>
<tr>
<td></td>
<td>Never</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>64</td>
</tr>
<tr>
<td>Female</td>
<td>Ever</td>
<td>73</td>
</tr>
<tr>
<td></td>
<td>Never</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>77</td>
</tr>
</tbody>
</table>
A few participants did not want to do similar things in their volunteer activities:

When I started to volunteer I purposely looked at something entirely different than I had been doing. I have met people who are not connected with my profession. (Female, Age 66)

A further question asked participants whether there were skills or abilities that they wanted to but they were unable to use. Here, 24% said yes, 66% said no and 10% stated they did not know. Participants who wanted to use other skills or abilities further explained:

Being recently retired I am looking to do things that are not ‘work-like.’ From the list above I seem to have succeeded! I imagine in future that I will again pick up things in which I am strong and have considerable experience. (Female, Age 62)

I can find no opportunities to use them. (Male, Age 68)

[I would like to use] management skills (manage people and/or processes/systems), but would be selective in taking on such a roles, [and] administration skills (administering budgets, contracts, processes, etc.). (Male, Age 58)

There is minimal responsibility in my current volunteer work, and no intellectual satisfaction. (Female, Age 61)

I'd like to teach, train or mentor people in areas in which I am comfortable. I miss this aspect of my paid work and have a comfort and strength in doing facilitation and teaching adults. (Female, Age 60)

I used to work in a decorating business and I don’t get to use these skills very often now. When I applied for this present volunteer position, I don't remember any questions about my skills. (Female, Age 64)

The majority of participants were content with the skill sets they were using and were not seeking to use other skills and abilities. However, participants were very open about their
volunteering preferences and experiences, and one respondent added these comments to the end of her survey, where there was room for additional comments:

I am still looking for meaningful volunteer activities. I have found that organizations that say they need volunteers in fact have little for me to do, and I have moved on to other areas. As I get farther [into] retirement, the desire to volunteer in a related field is stronger but I am unable to find appropriate opportunities. The biggest issue for me is a lack of self worth after many years in a responsible position. (Female, Age 61)

**Research Question 2: Knowledge Findings**

The results for Research Question 2 offer an in-depth view of the knowledge retirees transferred from their previous paid work to their volunteer activities: 73% of retiree participants indicated that they used this knowledge in their volunteer activities; 23% said they did not and 3% were unsure.

Knowledge is applied and it can manifest itself in the use of skills and abilities, so there was some overlap between the responses to Research Questions 1 and 2 regarding what the retirees said they were doing. More than half (63%) of the participants used knowledge about how to work with other people. For example, they mentioned using knowledge that they had gained in working with diverse groups, working in teams, resolving conflicts, managing people and using good communication techniques. The next most cited types of knowledge mentioned were administrative (33%), learning and education (22%), governance and leadership (15%) financial knowledge (10%), computer knowledge (10%), health-related/medical knowledge (8%) and other knowledge (20%). Table 6.7 contains selected examples of respondent quotes and their respective coding for type of knowledge.
**Table 6.7**

*Selected Examples of Open-Ended Responses for Each Knowledge Type*

<table>
<thead>
<tr>
<th>Open-Ended Response</th>
<th>Type of Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>“My knowledge of office administration and mentoring people are very important.”</td>
<td>Administrative; Mentoring</td>
</tr>
<tr>
<td>(Female, Age 62)</td>
<td></td>
</tr>
<tr>
<td>“My training and experience as an educator makes it easy to deal with and teach</td>
<td>Learning/Education</td>
</tr>
<tr>
<td>others of any age.”</td>
<td></td>
</tr>
<tr>
<td>(Male, Age 62)</td>
<td></td>
</tr>
<tr>
<td>“Human resource management in working with paid staff, clients and other</td>
<td>Working with People;</td>
</tr>
<tr>
<td>volunteers; project management in developing and carrying out programs”</td>
<td>Program/Project Development</td>
</tr>
<tr>
<td>(Female, Age 72)</td>
<td></td>
</tr>
<tr>
<td>“My knowledge of human behaviour, governance, leading groups, developing programs</td>
<td>Working with People;</td>
</tr>
<tr>
<td>were all part of my job.”</td>
<td>Governance/Leadership;</td>
</tr>
<tr>
<td>(Female, Age 66)</td>
<td>Program/Project Development</td>
</tr>
<tr>
<td>“My computer knowledge and my engineering knowledge.”</td>
<td>Computer; Other</td>
</tr>
<tr>
<td>(Male, Age 71)</td>
<td></td>
</tr>
<tr>
<td>“As a Construction Manager (Team Leader) and mentor of younger Construction Staff,</td>
<td>Working with People;</td>
</tr>
<tr>
<td>it was my job to make them believe that, ‘what they were doing was</td>
<td>Governance/Leadership;</td>
</tr>
<tr>
<td>important’ AND that, ‘they COULD do it.’</td>
<td>Mentoring</td>
</tr>
<tr>
<td>(whatever the task) I find I’m doing exactly the same job both in Habitat and</td>
<td></td>
</tr>
<tr>
<td>Village Theatre. (just not getting paid for it)”</td>
<td></td>
</tr>
<tr>
<td>(Male, Age 74)</td>
<td></td>
</tr>
<tr>
<td>“Leadership skills, coordinating skills, dealing with community groups. Consensus</td>
<td>Governance/Leadership;</td>
</tr>
<tr>
<td>building. Ferreting out negative participants.”</td>
<td>Administrative; Working with People</td>
</tr>
<tr>
<td>(Male, Age 62)</td>
<td></td>
</tr>
</tbody>
</table>

Contrary to expectations, some participants indicated that they were not using their knowledge in their volunteer activities:

To this point, my volunteer involvement has either been specific event support roles (i.e. one off tasks, usually physically oriented) or required new skills (e.g. first aid skills for ski patrol). I have made a few attempts to find volunteer roles that do leverage my career skills, but my skills (technology management) do not seem to have a broad need within volunteer organizations. Organizations that do
have such a need often engage with active workers interested in a volunteer role, I think partly to leverage the currency of their skills. (Male, Age 58)

I taught high school math, that was my paid job. But I also did the bookkeeping for my husband’s business. I never looked at this as my paid job. In my volunteer work I am using the accounting skills acquired from my bookkeeping, not the skills from my teaching. I just have a love of numbers and the accounting comes very naturally to me. (Female, Age 59)

My paid work has nothing to do with my volunteer work and they don’t come together at any time. (Female, Age 69)

Some participants indicated that they were unsure if they used their knowledge within their volunteer activities. For example, one said she gave more of her ‘self’ through her volunteer work using more of the ‘soft’ people skills: “Yes: teaching, mentoring, leading teams, training, organising, etc. No: there is more of a human side to my volunteer work that I never used in my paid work.”

Some participants did not wish to use knowledge from their previous paid work: “My work as a volunteer allows me to explore other avenues of interest heretofore neglected when I was employed.”

Finally, a few participants described feeling ‘underutilized’ within their volunteer work: “My volunteer work is enjoyable but does not challenge me intellectually. I have skills I am not using.”

**Research Question 3: Contextual Factors**

Research Question 3 examined the extent to which contextual factors were transferred from retirees’ paid work to their volunteer activities. Contextual factors were other aspects of volunteering that could be linked to previous paid work. The two contextual factors investigated
using a Likert-type scale were: working with similar clients, populations or groups; and working in similar work locations.

The findings indicate that 33% of participants strongly agreed, agreed or somewhat agreed that they worked in a similar location and 67% disagreed. More participants indicated that they worked with similar clients, populations or groups, with 43% strongly agreeing, agreeing or somewhat agreeing to this and 57% strongly disagreeing or disagreeing.

**Research Question 4: Learning Goals**

Most of retirees who responded to the survey described informal and formal learning goals for their volunteer activities, such as learning computer skills, house building skills, learning about social justice issue, and developing interpersonal skills. The majority of retirees identified informal learning goals; however, some were formally enrolled in courses through the community college or university for their volunteer work, and were, for example, taking accounting or music.

While the majority (75%) of the sample were able to identify volunteer-related learning goals, almost 25% indicated that they did not have any goals. Of the retirees who identified learning goals, about 30% described predominately one-dimensional learning goals. Approximately 8% spoke about physical goals and 5% described social goals (see Table 6.8). Interestingly, none of the retirees identified purely emotional or spiritual goals; however, about 17% identified cognitive goals. Many expressed more complex goals, with about 19% describing cognitive/physical goals.

Table 6.8

### Selected Examples of Learning Goal Responses

<table>
<thead>
<tr>
<th>The Type of Goal</th>
<th>Percentage</th>
<th>Respondent Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cognitive/Physical</td>
<td>19%</td>
<td>“Mastering this computer.” (Male, Age 73)</td>
</tr>
<tr>
<td>The Type of Goal</td>
<td>Percentage</td>
<td>Respondent Quote</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>------------</td>
<td>-------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>“I enjoy the physical activities of building houses, and the new knowledge of the process of how this actually takes place ....” (Male, Age 68)</td>
</tr>
<tr>
<td>Cognitive</td>
<td>17%</td>
<td>“Attending training sessions as require and an ongoing awareness of my community resources.” (Male, Age 58)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>“Understanding the ‘mechanics’ of the organization and how to rationalize and improve systems.” (Male, Age 62)</td>
</tr>
<tr>
<td>Cognitive/Social/Emotional</td>
<td>11%</td>
<td>“I am gaining a greater understanding of elderly people and their outlook on life; positive and negative.” (Male, Age 66)</td>
</tr>
<tr>
<td>Cognitive/Social</td>
<td>8%</td>
<td>“Helping people understand a new country and enable them to appreciate their new country Canada.” (Female, Age 70)</td>
</tr>
<tr>
<td>Physical</td>
<td>8%</td>
<td>“I have learned to build through working with Habitat.” (Female, Age 62)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>“I started volunteering in an environment that was polar opposite to my work. I wanted to use my hands more and engage in physical activities. My work was sedentary and I did not want that type of volunteering.” (Male, Age 63)</td>
</tr>
<tr>
<td>Cognitive/Emotional</td>
<td>6%</td>
<td>“I would like to become more heavily involved at a higher level in order to learn more about social justice issues.” (Female, Age 57)</td>
</tr>
<tr>
<td>Social/Emotional</td>
<td>6%</td>
<td>Female participant, Age 59: “I want to learn how to better help people since I am dealing with seniors.”</td>
</tr>
<tr>
<td>Social</td>
<td>5%</td>
<td>“You can always learn better people skills.” (Male, Age 73)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>“Now that I am not the ‘boss’ I have learned to work with groups much better. I want to be a better listener.” (Male, Age 63)</td>
</tr>
<tr>
<td>Cognitive/Social/Physical</td>
<td>5%</td>
<td>“Keeping abreast of new and improved technology that will help myself or others on the ‘team’. It is usually the older members who are teaching the new members. But they also teach us different ways to do things.” (Female, Age 59)</td>
</tr>
<tr>
<td>Emotional/Social/Spiritual</td>
<td>4%</td>
<td>“Hospice work with the dying. I hope to bring comfort.” (Female, Age 71)</td>
</tr>
</tbody>
</table>
Cognitive/social/emotional goals were articulated by approximately 11% of the survey participants and social/emotional goals were expressed by about 6%. A 70-year old female participant describes her cognitive/social/emotional goals in the following quote where she states her desire for mental stimulation, revealing the resulting connection to peers and community and her emotional reaction to her volunteer engagement:

I did not think volunteering would bring me so much. At first I volunteered in a community organisation, and although I cooked meals and taught newly arrived immigrants how to cook, I did not get the intellectual stimulation I needed. Now I feel I am learning through my peers and giving back for having received so much in my life.

Approximately 5% of participants expressed cognitive/social/physical learning goals:

[I want to] learn more about adult learning and the aging process. [I] volunteer with Baycrest and the Rotman Research Institute and Brain Function, and the natural aging Process, which I find fascinating .... I began when my mother was alive but had been diagnosed with Alzheimer's disease and my father had Parkinson’s. I wanted to know how I could communicate with them both more affectively, since so much in the brain had changed each of them and their abilities to recognize, communicate and function .... (Female, Age 63)

Approximately 3% of participants had cognitive/social/emotional/physical learning goals:

I am currently involved in something I never imagined doing – leading a choir of seniors (in their 50’s to 80’s). I am learning with and from them as I prepare each week and as we sing together. This year, I took a course in community choir leadership and continue to add knowledge, skills and repertoire. My goals are to continue to discover a wide range of possibilities and topics for teaching, for setting up our practices, and for encouraging each person to enjoy what we’re doing together. (Female, Age 66)
Almost 2% of participants shared what could best be described as a holistic learning goal that encompassed all five dimensions of learning:

I currently visit my client at the Cancer Clinic and give her Reiki and spiritual advice while she receives blood, has fluids drained and receives her chemo. I am expanding my knowledge base and stretching my attitudes, actions and beliefs. (Female, Age 56)

A 72-year old male participant declared that “I have learned about death and dying, bereavement and palliative care.”

Some of the participants recognized that learning can occur informally and anywhere. Learning goes beyond a formal education, as a 66-year old female participant stated: “I do not have any goals through volunteering but every opportunity can be a learning situation.” Some participants stated that they had experienced learning about themselves:

“I believe that I have grown as a person in the past decade - in my knowledge of self and others and because of circumstances "given" to me.” (Female, Age 63)

The participants’ interest in learning and the fact that the majority have learning goals is consistent with their scores on the 5-item Openness to Learning measure. These items are outlined in Table 6.9. Based on these items, a summary index of openness to learning was computed for each respondent as the average response across these items. This index had a mean of 4.61 and standard deviation of 0.42.

Table 6.9
Openness to Learning Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Somewhat Agree</th>
<th>Agree</th>
<th>Strongly Agree</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like learning new things.</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>68</td>
<td>141</td>
<td>213</td>
</tr>
<tr>
<td>Staying mentally active</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>32</td>
<td>174</td>
<td>213</td>
</tr>
<tr>
<td>Item</td>
<td>Strongly Disagree</td>
<td>Disagree</td>
<td>Somewhat Agree</td>
<td>Agree</td>
<td>Strongly Agree</td>
<td>Total</td>
</tr>
<tr>
<td>---------------------------------------------------------------------</td>
<td>-------------------</td>
<td>----------</td>
<td>----------------</td>
<td>-------</td>
<td>----------------</td>
<td>-------</td>
</tr>
<tr>
<td>and engaged is <strong>NOT</strong> important to me.*</td>
<td>2</td>
<td>0</td>
<td>5</td>
<td>74</td>
<td>132</td>
<td>213</td>
</tr>
<tr>
<td>Lifelong learning is important to me.</td>
<td>0</td>
<td>1</td>
<td>5</td>
<td>69</td>
<td>138</td>
<td>213</td>
</tr>
<tr>
<td>I am interested in many things.</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>90</td>
<td>113</td>
<td>213</td>
</tr>
<tr>
<td>I seek out opportunities to learn something new.</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>90</td>
<td>113</td>
<td>213</td>
</tr>
</tbody>
</table>

*Note. *Item reversed for scoring

A comparison of the openness to learning index for participants who had volunteer-related learning goals \( (M = 4.65, SD = 0.40) \) and those who did not \( (M = 4.50, SD = 0.47) \) showed a significant difference, \( t(211) = 2.249, p < .05 \), \( \eta^2 = .023 \). This is a small effect size.

This male participant, age 61 talked about being open to new things in his volunteer activities:

> It is important to try different things. When I retired I was aware of the need for volunteers at the local extended care facility. Our church has a service there one morning a week, and they needed volunteers to help gather the residents who wanted to attend the service. I said I would try it for three weeks, but I was afraid it would be too depressing. Much to my amazement, I found it was hugely rewarding work. I became very good friends with a young man who had MS, and who was able only to blink his eyes and who had been in that state for several years. Marcel, for that was his name, was an inspiration to me, filled with such joy for life. There is also a young lady there in a similar state as Marcel, and there are several people with strokes, Alzheimer’s and various other debilitating conditions. Every week I see these people, I am humbled by their love, their dignity and their bravery. I have been going there every week for three years, and it is the highlight of my week. It is the only time in my week that is totally unavailable for any other activity. Without this volunteer experience, I would have been a lesser person.
Research Question 5: Factors Contributing to Participants’ Choice of Activities

Phase 1 participants spoke about retirement providing freedom within the volunteer role that enables them to choose which activities to pursue. To further investigate the factors to affect retirees’ choices of volunteer activities, participants in Phase 2 were asked to identify what most contributed to their choice of volunteer activities; this investigation is not addressed directly by the research questions, but may inform the interpretation of the other results. Table 6.10 provides the responses of the Phase 2 participants. Many participants (43%) stated that they chose activities in order to contribute to their community and to society. Almost 20% of participants indicated that being active and engaged was most important to them in choosing their activities. Fourteen percent said that believing in the cause was the most important reason, and interestingly, almost an additional 4% said that being personally affected by the cause was the most important. Participants stated that using skills and abilities (7%), learning something new (2%) or using knowledge (1%) was the most important reason for choosing activities.

Table 6.10
What Most Contributes to Participants’ Choice of Volunteer Activities

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributing to my Community and to Society</td>
<td>91</td>
<td>42.5</td>
</tr>
<tr>
<td>Being Active and Engaged</td>
<td>42</td>
<td>19.6</td>
</tr>
<tr>
<td>Using Skills and Abilities</td>
<td>14</td>
<td>6.5</td>
</tr>
<tr>
<td>Using Knowledge</td>
<td>3</td>
<td>1.4</td>
</tr>
<tr>
<td>Learning Something New</td>
<td>5</td>
<td>2.3</td>
</tr>
<tr>
<td>Believing in the Cause</td>
<td>30</td>
<td>14.0</td>
</tr>
<tr>
<td>Having Social Interaction</td>
<td>11</td>
<td>5.1</td>
</tr>
<tr>
<td>Being Personally Affected by the Cause/Issue</td>
<td>8</td>
<td>3.7</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
<td>4.7</td>
</tr>
</tbody>
</table>
Participants found it very difficult to choose one from among these items as they felt that many of these contributed to their choice of activities. Their reasons for choosing volunteer activities were nuanced and not simply due to one reason. In fact, a number of participants indicated that a combination of factors or all factors jointly contributed to their choice of volunteer activities:

Actually I could have answered the question with other selections. I think a combination of motivations would be more accurate. I believe in the idea that one should contribute to a society that has fed and nurtured us throughout our lives and hospitals particularly that sustain us in times of physical crisis. I am good at interaction, perhaps because I enjoy it and using this natural gift in a volunteer setting is very gratifying for me; giving me a sense of value to my community ... a strange but pleasant role for an old man! (Male, Age 74)

There are so many right answers but since I have to choose one instead of all of the above I just feel that I simply want to serve and respond to whatever is requiring attention. (Male, Age 62)

While it is really important for me to believe in the cause, I am always more comfortable offering my skills and abilities (ability to hit the ground running) rather than draining their usually limited resources to get me up to speed. Learning new things is always a welcome by product. (Female, Age 61)

Seems I can’t choose just one. For example [being active and engaged, using my skills and abilities, using my knowledge] are equally and the most important to me. I’d say if a volunteer activity does not give me these things, I am not interested. (Female, Age 66)

I’ve spent quite a bit of time with this question – each of those items is part of why I volunteer. I do not have a MOST important reason, though if I picked only one volunteer involvement ... I would be able to say “learning something new” is a very big part of my motivation. (Female, Age 66)
Almost 5% of participants selected the Other category because they also felt they were unable to choose one of the above responses:

I believe that all of the above are important in my choice of volunteer activities ... to some degree the use of my skills/abilities/knowledge allow me to contribute to society/community in addition to complementing my self-growth. (Female, Age not stated)

Often I get involved just because something needs to get done and there [are] not enough others to help – or I want to help out someone in particular, of some group in particular. Sometimes it isn’t the cause as much as the people who need help. (Female, Age 60)

Doing something I enjoy. There were many of the choices above that I could have chosen, but in thinking about it, what I get from all my volunteering is enjoyment. Yes to being active and engaged, using my skills and abilities, knowledge and contributing to community, but I have fun doing what I do. One thing not covered is commitment, or the ability and desire to commit to something. By this I do not mean ‘believing in a cause,’ but rather yes I will start something, yes I will be there to finish it. (Male, Age 56)

All the time you are retiring it’s important to go on living or you’re not really retired. The role and involvement of the extended family, especially grand children/aging parents, all are important factors in determining the choice of volunteer activities we are involved in. Volunteering should not be viewed as make-work projects set aside for old people to do! (Male, Age 62)

In order to better understand how participants chose their volunteer activities, they were also asked if they had consciously chosen volunteer activities related to their paid work, if their volunteer activities had developed through a planned approach or serendipitously and whether someone had asked them to volunteer with a nonprofit organization. Table 6.11 outlines their responses to these questions. Approximately equal percentages of participants indicated that they
had consciously chosen volunteer activities related to their paid work (25%) or not related to their paid work (24%). Fifty-one percent of participants reported that they did not give this much thought. In addition, approximately 30% of participants stated that their volunteer activities developed through a planned approach whereas 70% of participants stated that they had developed serendipitously. Almost 42% indicated that someone had asked them to volunteer or help out at a nonprofit.

Table 6.11

Reasons for Choices of Volunteer Activities

<table>
<thead>
<tr>
<th>Reason</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consciously Choose Volunteer Activities Related to Work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Were related/somewhat related to paid work</td>
<td>54</td>
<td>25.2</td>
</tr>
<tr>
<td>Were not related to paid work</td>
<td>51</td>
<td>23.8</td>
</tr>
<tr>
<td>Did not give this much thought</td>
<td>109</td>
<td>50.9</td>
</tr>
<tr>
<td>How Volunteer Activities Developed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Through a planned approach</td>
<td>63</td>
<td>29.4</td>
</tr>
<tr>
<td>Through serendipitous opportunities</td>
<td>149</td>
<td>69.6</td>
</tr>
<tr>
<td>No Response</td>
<td>2</td>
<td>.9</td>
</tr>
<tr>
<td>Were You Asked to Help Out/Volunteer at a Nonprofit Organization?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>89</td>
<td>41.6</td>
</tr>
<tr>
<td>No</td>
<td>122</td>
<td>57.0</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2</td>
<td>.9</td>
</tr>
<tr>
<td>No Response</td>
<td>1</td>
<td>.5</td>
</tr>
</tbody>
</table>

Participants explained how they choose their volunteer activities and many of their comments indicate that this process was not planned and they took advantage of opportunities that were presented to them, as Table 6.12 demonstrates.
Table 6.12

*Selected Examples of Open-Ended Responses to Consciously Chosen Volunteer Activities Related to Paid Work*

<table>
<thead>
<tr>
<th>Consciously Chosen Activities</th>
<th>Open Ended Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related or somewhat related to work</td>
<td>“I felt more confident that I could contribute when I was asked to join this board.” (Female, Age 66)</td>
</tr>
<tr>
<td></td>
<td>“My son belonged to this volunteer organization and I became his driver and later was asked to join because of my career.” (Female, Age 59)</td>
</tr>
<tr>
<td></td>
<td>“While at [my workplace] I led the group that established this [nonprofit organization]. I am a gardener, an enlightened environmentalist with a very strong science background and realized that the whole environmental area needed some intelligent thinking injected into it. I always knew that I would work with [this organization] when I retired. It brings a lot of my interests together. I am the Treasurer of the organization as well.” (Male, Age 62)</td>
</tr>
<tr>
<td></td>
<td>“My first choice was one that was related to my first career and I felt (correctly, as it turned out), this might be an easy fit. My second choice was very different so as to keep me from getting too wrapped up in the ‘sadness’ associated with hospital work. I had been very interested in [this nonprofit organization’s] work and philosophy for some time and it fit with some of my ‘hobby’ knowledge.” (Female, Age 61)</td>
</tr>
<tr>
<td>Were not related to work</td>
<td>“But little things kept coming up that I could help with, that did not relate to my previous work.” (Female, Age 69)</td>
</tr>
<tr>
<td></td>
<td>“I chose something that would give me a change, broaden my experience. I always wondered what else I might have done in my career.” (Female, Age 61)</td>
</tr>
<tr>
<td></td>
<td>“Sometimes I have been asked to volunteer [in] relation to small children and sometimes I have said no because I have done that for so many years, I wanted to do something different. However, working with other volunteers, I appreciate working with those who do have some basic skills and experience in the area, not just a willingness.” (Female, Age 60)</td>
</tr>
<tr>
<td></td>
<td>“I wanted to interact with people from different aspects of our society.” (Male, Age 58)</td>
</tr>
<tr>
<td></td>
<td>“I like to work with my hands and my mind. I had limited ‘hand’ work when I was being paid.” (Female, Age 66)</td>
</tr>
<tr>
<td>Consciously Chosen Activities</td>
<td>Open Ended Response</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Did not give this much thought</td>
<td>“Time for new opportunities. I was a collection manager/auditor, trainer for a large financial organization which provided me the opportunity to take. Retirement allows me to give back to the community [and this] has provided me with a satisfying and very active life.” (Female, Age 60)</td>
</tr>
<tr>
<td></td>
<td>“I wanted something different with no decision making and no ‘ultimate responsibility’.” (Female, Age 55)</td>
</tr>
<tr>
<td></td>
<td>“My paid work was being a consultant in project management and computer systems. I have never found a volunteer position that uses these skills.” (Female, Age 64)</td>
</tr>
<tr>
<td></td>
<td>“I just wanted to do something that would be beneficial and rewarding. When I volunteered for [this organization], I did not know in which area they would place me.” (Female, Age 67)</td>
</tr>
<tr>
<td></td>
<td>“I chose things that interested me and would enrich the life of the community.” (Female, Age 71)</td>
</tr>
<tr>
<td></td>
<td>“I fell into activities I felt comfortable with and was able to use some of the skills I had that were not related to my previous business.” (Male, Age 71)</td>
</tr>
<tr>
<td></td>
<td>“I am constantly asked to volunteer. My decision to do so or not to do so is based on matching the organization’s values with my own. Beyond that, I don’t care if it is an area related to my work environment or area of focus (education, nursing, administration, etc). Many of my volunteer activities have been serving on boards etc, so in that respect it is similar to my work experience – meetings, decision making.” (Female, Age 60)</td>
</tr>
<tr>
<td></td>
<td>“None of the above [options] really apply. I am usually asked to volunteer, and if I can, I agree.” (Male, Age 69)</td>
</tr>
<tr>
<td></td>
<td>“I mostly went to Habitat for Humanity because I thought it [would help] the housing crisis for poor people (...it makes a very small contribution to such a very large problem), because I thought that I might be exposed to a critical analysis of poverty and housing...and because I might learn some new construction skills (and that turned out to be true, I did!” (Male, Age 68)</td>
</tr>
<tr>
<td></td>
<td>“I kind of fell into the volunteer roles. They were presented to me and have proved very rewarding.” (Female, Age 73)</td>
</tr>
</tbody>
</table>

Table 6.13 provides a cross tabulation of these 3 items to determine if there is a clear pattern to the participants’ choice. Because of small numbers of participants for some combinations of responses, it was not possible to test the relationship among the items. However,
the numbers in Table 6.13 suggest that there is no clear relationship between these variables: participants who took a planned approach with volunteer activities were no more likely to have consciously chosen activities related to their paid work. Those who were asked and those who were not asked to volunteer were equally likely to report that their activities developed serendipitously. Their planning may have been flexible and time-limited, like this participants’, who gave the following retirement advice:

Don't plan too much for the first year of retirement and don’t volunteer for all the things that people want you to do when they say “Now that you’re retired....” Be open and see what comes up. (Female, Age 56)

Table 6.13
Cross Tabulation of Consciously Chosen Volunteer Activities Related to Work by Activities Developed Serendipitously by Did Someone Ask You to Volunteer?

<table>
<thead>
<tr>
<th>Did someone ask you to volunteer at a nonprofit?</th>
<th>Did you consciously choose volunteer activities related to your paid work?</th>
<th>Volunteer activities developed through</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Were related/somewhat related to paid work</td>
<td>A Planned Approach</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Serendipitous Opportunities</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>Were not related to paid work</td>
<td>7</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>Did not give this much thought</td>
<td>4</td>
<td>42</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>19</td>
<td>70</td>
</tr>
<tr>
<td>No</td>
<td>Were related/somewhat related to paid work</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td></td>
<td>Were not related to paid work</td>
<td>9</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Did not give this much thought</td>
<td>21</td>
<td>38</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>44</td>
<td>77</td>
</tr>
<tr>
<td>Don’t know</td>
<td>Did not give this much thought</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>

Participants were asked about their well-being, their sense of well-being from their volunteer activities, and whether volunteering during retirement made their transition to retirement easier. Wellbeing was measured using a 3-item measure and based on these, a
summary index of well-being was computed for each respondent as the average response across these items. This index had a mean of 4.40 and standard deviation of 0.59, indicating that, in general, the participants had high psychological well-being. A 3-item measure was also used to assess well-being derived from volunteer activities. This index had a mean of 4.45 and a standard deviation of 0.59, indicating that participants reported high well-being from their volunteer activities. One participant said “Volunteering is a great opportunity for retirees to gain the life satisfaction of helping others and making our society a better place to live in. It gives one immense self satisfaction” (Male, Age 67).

The majority of participants (69%) agreed or strongly agreed with the statement ‘my volunteer activities made my transition into retirement easier.’ An additional 22% somewhat agreed with this statement and only nine percent strongly disagreed or disagreed.

**Research Question 6: Career Self-Concept**

Research question 6 examined the extent that participants’ career self-concepts changed from those they developed during their paid work careers, as they became engaged in later-life volunteer roles. As previously described, this section of the survey consisted of a series of open-ended questions about the self, as well as a 10-item scale of Likert-type items, which is the focus of Research Question 7. Tables 6.14 and 6.15 describe how the responses to the open-ended questions were coded.
Table 6.14

Selected Examples of Open-Ended Responses and Participants' Previous Life Roles

<table>
<thead>
<tr>
<th>Life Roles</th>
<th>Open Ended Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Role</td>
<td>“An active business woman.” (Female, Age 64)</td>
</tr>
<tr>
<td></td>
<td>“A hard working teacher. A singer. A nature lover.” (Female, Age 59)</td>
</tr>
<tr>
<td></td>
<td>“I am a trained professional assessing and treating those who need my services. I am proud of my skills and am gratified by the responses from those I’ve helped. A career in a service profession was the best choice for me.” (Female, Age 63)</td>
</tr>
<tr>
<td></td>
<td>“Administrator, leader, counsellor.” (Male, Age 62)</td>
</tr>
<tr>
<td></td>
<td>“I would have said I was a teacher – especially of music and Canadian History.” (Female, Age 67)</td>
</tr>
<tr>
<td></td>
<td>“[I was a] counsellor; [a] mentor; fortunate to have been in a career I love.” (Female, Age 59)</td>
</tr>
<tr>
<td></td>
<td>“I was concerned that I would miss the challenges of helping others. Miss the contact with the many work force people and customers who had become friends. Not sure if I was doing the right thing at the right time.” (Male, Age 71)</td>
</tr>
<tr>
<td></td>
<td>“During the year before I retired I was aware that I was transitioning to a new phase of my life and I was worried about not being busy, not doing enough, being forgotten and looking at life instead of contributing to it. I am driven, detail oriented and therefore a bit of a workaholic. Work was a big part of my life and defined myself to a certain extent.” (Female, Age 55)</td>
</tr>
<tr>
<td>Family Role</td>
<td>“Housewife. Mother. Grandmother.” (Female, Age 70)</td>
</tr>
<tr>
<td>Work and Family Roles</td>
<td>“A teacher, a family member and a happy person.” (Female, 71)</td>
</tr>
<tr>
<td></td>
<td>I was a husband, father and a senior executive... in the Government of Canada. I was a very stressed individual with physical and mental signs of burnout. My family life suffered as a result, and outside of work I had little involvement with friends and the wider community. (Male, Age 55)</td>
</tr>
<tr>
<td></td>
<td>“I am a mother, a wife and a principal. I am extremely dedicated to serving the staff, children and parents of my school community. I wish I had more time to devote to family. I worry about health, family issues, job.” (Female, Age 55)</td>
</tr>
<tr>
<td></td>
<td>“I am an excellent physician with a wide reputation. I am considered an excellent 'teacher’. I am a parent and husband. I am an excellent physician with a wide reputation. I am considered an excellent ‘teacher.’ I am a parent and husband.” (Male, Age 68)</td>
</tr>
<tr>
<td></td>
<td>“I am a mother and grandmother. I am a Customer Service/Sales Assistant.” (Female, Age 67)</td>
</tr>
<tr>
<td>Work and Leisurite Roles</td>
<td>“I am a government manager who is getting tired of bureaucracy. I am a small cog in a big wheel. I am looking forward to travelling more and not being frustrated by my work.” (Male, Age 62)</td>
</tr>
<tr>
<td>Life Roles</td>
<td>Open Ended Response</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Work, family and citizen roles</td>
<td>“I am a mother with 3 boys and 2 grandchildren; a realtor who volunteers for Habitat for Humanity; and a widow.” (Female, Age 60)</td>
</tr>
<tr>
<td></td>
<td>“I am a French teacher, always known as ‘Madame,’ I am an active member of my community. I am a wife and mother.” (Female, Age 56)</td>
</tr>
<tr>
<td></td>
<td>“I would have defined myself by my job title and performance/capabilities. I am a healthy, capable person who is active in the community. I support many causes and regularly ‘give back’ to my community.” (Female, Age 58)</td>
</tr>
<tr>
<td>Work, family and leisurite roles</td>
<td>“I am a consultant and educator who works at a demanding job in a high stress environment at the provincial and local level to develop and implement policy. I am also a wife, grandmother and friend and have many other interests in my life, when I have time to pursue them.” (Female, Age 62)</td>
</tr>
<tr>
<td></td>
<td>“I had an active home life with a wife and teenage daughter. I travelled a lot around North America working as a trainer for the telecom industry. I spent much of my free time pursuing my interests such as summer and winter sports, home improvement projects, woodworking.” (Male, Age 57)</td>
</tr>
<tr>
<td>Family and Citizen Roles</td>
<td>“[W]ife, mother, best friend to my spouse; caregiver to spouse with chronic depression. [I] had to be busy all the time -- volunteering was something of an obsession- looking for something which I had yet to define.” (Female, Age 68)</td>
</tr>
<tr>
<td>Work, Family, Citizen, Leisurite Roles</td>
<td>“I am a wife and mother (to my grandson). I am a artist/writer. I volunteer in my grandchildren’s school. I serve on the school council. I love to cook/decorate.” (Female, Age 66)</td>
</tr>
<tr>
<td></td>
<td>“Married – 4 grandkids – enjoying life – travelling – volunteering.” (Male, Age 60)</td>
</tr>
<tr>
<td>Other Self Described</td>
<td>“Frenetic, anxious, insecure.” (Female, Age 62)</td>
</tr>
<tr>
<td></td>
<td>“I am a person who was suffering from severe medical problems and recovering from a kidney transplant. I am a person who was very fortunate to have wonderful support from my coworkers and management in coping with my medical problems. I was very run down and tired.” (Male, Age 58)</td>
</tr>
</tbody>
</table>
Table 6.15
Selected Examples of Open-Ended Responses and Participants’ Current Life Roles

<table>
<thead>
<tr>
<th>Life Roles</th>
<th>Open Ended Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteer Role</td>
<td>“I am still a hard working person who needed to become a volunteer because I like to be busy.” (Female, Age 75)</td>
</tr>
<tr>
<td></td>
<td>“I am still caring and organized and have extra time and energy to work with a charitable organization to help them achieve their goals without being responsible for those goals.” (Female, Age 61)</td>
</tr>
<tr>
<td></td>
<td>“[I am] an almost full-time volunteer – about 25 hours a week. [I am] volunteering in the area of palliative care and working closely with people with dementia. I view what I do now as ‘giving back time.’” (Male, Age 71)</td>
</tr>
<tr>
<td></td>
<td>“I now use my previous writing skills to write Standard Operating Procedures and training manuals for the organization I volunteer for. I also use my skills with MS Excel to create and modify financial spreadsheets to allow more accurate record keeping of monthly sales.” (Male, Age 59)</td>
</tr>
<tr>
<td></td>
<td>“I am an active volunteer. I feel valued when I volunteer. I have control of my own schedule.” (Female, Age 74)</td>
</tr>
<tr>
<td></td>
<td>“Still enjoy organizing but prefer assisting with this for various ethical organizations.” (Female, Age 67)</td>
</tr>
<tr>
<td></td>
<td>“Time to look at other activities and plan. Travel, Golfing, etc. Volunteer work when [I am] available.” (Male, Age 57)</td>
</tr>
<tr>
<td>Retiree Role</td>
<td>“I am somebody who has all the time I want to give to family, friends and community. I am physically fit and ‘medication-free.’ I have varied interests (arts, sports, travel) and lots of time to dabble in all of them.” (Female, Age 55)</td>
</tr>
<tr>
<td></td>
<td>“I care for my children, stepchildren and grandchildren. I am a citizen of the world and promote human equality and respect. I am retired and have accepted that it is acceptable to have time for myself.” (Male, Age 68)</td>
</tr>
<tr>
<td></td>
<td>“Much more relaxed and better rounded: able to discover talents on the creative side. I like having time to think and to do what appeals as opposed to what I have to do.” (Female, Age 62)</td>
</tr>
<tr>
<td>Volunteer and Retiree</td>
<td>“I am a 69 year old female who has retired from paid work. I am still married with 2 adult children, a daughter-in-law, a granddaughter. I am a hospice community volunteer, Buddhist, socially concerned, yoga student etc). I am the same as before retirement but with more free time and less concerned with what others think.” (Female, Age 69)</td>
</tr>
<tr>
<td>Role</td>
<td>“I am happily retired with my wife for 10 years. We travel a lot but I stay involved in Health Care through my volunteer activity on Boards. I am living happily on retirement savings.” (Male, Age 62)</td>
</tr>
<tr>
<td></td>
<td>“I am a retired teacher, grandmother, wife, volunteer. I enjoy time to relax, exercise, work at hobbies and time to travel.” (Female, Age 59)</td>
</tr>
<tr>
<td></td>
<td>“Retiree, still widow, mother, Nanna . Occasional organizer of community events. Volunteer.” (Female, Age 71)</td>
</tr>
<tr>
<td>Life Roles</td>
<td>Open Ended Response</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>“I am a more relaxed retired educator who volunteers. I am also a wife, grandmother and friend. I spend many hours in leisure pursuits such as gardening, home decorating and travel.” (Female, Age 62)</td>
<td></td>
</tr>
<tr>
<td>I am a retired family man who has rediscovered the pleasures of living a full life. I travel extensively, enjoy hobbies and have rekindled old friendships, and for the first time in years I feel good about who I am and am comfortable in my life. I also devote time as a volunteer crisis worker at a local distress centre. (Male, Age 55)</td>
<td></td>
</tr>
<tr>
<td>“I am still an active healthcare provider and clinician involved in palliative care and part-time teaching of forensic medicine. My research in my volunteer institution is mostly under my own direction.” (Male, Age 56)</td>
<td></td>
</tr>
<tr>
<td>“I am an educator. I believe in physical fitness. I believe in helping others.” (Male, Age 72)</td>
<td></td>
</tr>
<tr>
<td>“A highly-skilled professional, using my skills and experience in an arena where the impact is wider, more direct and more satisfying.” (Female, Age 65)</td>
<td></td>
</tr>
<tr>
<td>Work Role</td>
<td>“A family member, a student, and a happy person.” (Female, Age 71)</td>
</tr>
<tr>
<td>“[I am a] family man (now with grandson), creative, business person.” (Male, Age 64)</td>
<td></td>
</tr>
<tr>
<td>“I am an independent mature woman, mother, grandmother, friend, and gardener.” (Female, Age 70)</td>
<td></td>
</tr>
<tr>
<td>“Widower – trying to keep busy – enjoying the grandkids.” (Male, Age 60)</td>
<td></td>
</tr>
<tr>
<td>Family Role</td>
<td>“I’m enjoying the time I spend working around the house. I enjoy the frequent vacations taken.” (Male, Age 65)</td>
</tr>
<tr>
<td>“[M]ore relaxed; do projects on my own time; time to exercise.” (Female, Age 73)</td>
<td></td>
</tr>
<tr>
<td>“Much older and feeling it, following heart failure and ensuing surgery. But I find much more pleasure in simpler things. I moved eventually to the West and enjoy my grandchildren. I walk by the sea and am nurtured by it almost daily. I am single now yet content. I sing (formally – with a community choir) and am experiencing the same feeling I had in my last years at work. That the choir is technically moving ahead of me or that I am falling behind. This makes me mildly sad but is acceptable to me. I am grateful for the many things I enjoy in life.” (Male, Age 74)</td>
<td></td>
</tr>
</tbody>
</table>

The participants’ pre-retirement roles and their current or present roles were categorized into roles based on Super’s (Super et al., 1996) life roles and a cross-tabulation of previous roles versus present roles was done to look at the number of cases in each role. The observed frequencies in Table 6.16 show that most of the participants who self-identified with the worker
role during the year prior to their retirement saw themselves as volunteers at the time of the survey. In fact, despite the range of roles prior to retirement, at the time of the survey, more than half (52.1%) of participants in this sample saw themselves as volunteers. In addition, about 20% identified themselves as retirees, and 10% saw themselves as retirees and volunteers. The participants shared their thoughts on the process of how their career self-concepts changed from those developed during their previous paid work to those developed through their volunteer activities.

Table 6.16

Cross-tabulations of Roles Prior to Retirement versus Roles Now Retired

<table>
<thead>
<tr>
<th>Roles During the Year Prior to Retirement</th>
<th>Roles Now Retired</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Volunteer</td>
<td>Retiree</td>
<td>Volunteer and Retiree</td>
<td>Worker</td>
<td>Leisurite</td>
<td>Family Role</td>
<td></td>
</tr>
<tr>
<td>Worker</td>
<td>41</td>
<td>23</td>
<td>10</td>
<td>10</td>
<td>0</td>
<td>1</td>
<td>85</td>
</tr>
<tr>
<td>Work and Family</td>
<td>19</td>
<td>10</td>
<td>7</td>
<td>0</td>
<td>3</td>
<td>9</td>
<td>48</td>
</tr>
<tr>
<td>Worker and Leisurite</td>
<td>5</td>
<td>3</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Work and Citizen</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>11</td>
</tr>
<tr>
<td>Family Role</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Worker, Family Role and Citizen</td>
<td>9</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>Worker, Family Role and Leisurite</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>11</td>
</tr>
<tr>
<td>Family Role and Citizen</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Worker, Family Role, Leisurite and Citizen</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Total</td>
<td>99</td>
<td>39</td>
<td>19</td>
<td>15</td>
<td>5</td>
<td>13</td>
<td>190</td>
</tr>
</tbody>
</table>
As Table 6.16 suggests, the participants underwent a transformation in their sense of career self-concept during their transition to retirement. During this process, the role of volunteer became very important and volunteering offered them a new role. In fact, one respondent said: “I am a Professional Volunteer!” (Female, Age 62) and three others called themselves full-time or almost full-time volunteers. These participants seem to have redefined themselves. Another respondent said:

It is difficult to realize that you are no longer needed and feel that, in some instances you have nothing to offer anymore. Volunteering at the Habitat for Humanity Restore in Halton Region gave me a new outlook and a purpose. I enjoyed working there and was looked up to for my abilities and knowledge to help in the merchandising of products in the Restore. Also the interaction with shoppers was an added bonus to being there and helping them with their selection of products for their use. (Male, Age 72)

Participants indirectly connected their skills and abilities to their sense of self. For example, a respondent indicated she is not using leadership or management skills anymore: “I am still caring and organized and have extra time and energy to work with a charitable organization to help them achieve their goals without being responsible for those goals” (Female, Age 61). The participants were very open and insightful about their transformation process, explaining this career self-concept change in their own words. Many of the female participants were particularly candid. Table 6.17 provides examples of the participants’ transformation.
Table 6.17

Selected Examples of Participants Change in Career Self-Concept

<table>
<thead>
<tr>
<th>Participant</th>
<th>Description of the Self During the Year Prior to Retirement</th>
<th>Description of the Self at the Time of the Survey</th>
<th>Career Self-Concept Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female, Age 55</td>
<td>“During the year before I retired I was aware that I was transitioning to a new phase of my life and I was worried about not being busy, not doing enough, being forgotten and looking at life instead of contributing to it. I am driven, detail oriented and therefore a bit of a workaholic. Work was a big part of my life and defined myself to a certain extent.”</td>
<td>“Now, I am still driven, detail oriented and a bit of a workaholic but now I apply these characteristics to my volunteer work. As a retiree I have more time than other volunteers. I feel useful and part of something. It makes me happy. I received a lot in my life and feel I was very lucky, so it makes me happy to give back in various ways, particularly through volunteer work.”</td>
<td>Pre-retirement: Driven and detail-oriented worker; work role contributed greatly to her ‘self’; wanted to be busy, not bored. Now: The characteristics that made her the type of worker she was are transferred and incorporated into her volunteer role.</td>
</tr>
<tr>
<td>Female, Age 73</td>
<td>“My [sense of] self as a mother and career person was slowly disappearing, and I began to feel insecure and small as I wondered how and where I would find fulfillment for the rest of my days. I did a great deal of exploring and joining to discover who I had become at this stage. Soon I realized what and where I wanted to be, and made decisions in the direction of satisfaction.”</td>
<td>“I am an active volunteer. I feel valued when I volunteer. I have control of my own schedule.”</td>
<td>Pre-retirement: Career person; felt career self disappearing; insecurity; active exploring to regain sense of self. Now: She is an active volunteer; self-esteem.</td>
</tr>
<tr>
<td>Participant Demographic Characteristics</td>
<td>Description of the Self During the Year Prior to Retirement</td>
<td>Description of the Self at the Time of the Survey</td>
<td>Career Self-Concept Change</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-----------------------------------------------------------</td>
<td>--------------------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Female, Age 63</td>
<td>“I would see myself a caring, intelligent, educated person who was in a helping profession designed to improve the education of both young people and adults alike. As an elementary school Principal, I had a myriad of responsibilities and duties which included a wide-ranging involvement in the school community and in the city at large. I was and am a lifelong learner.”</td>
<td>“I am still the same person I was, only now, there is not the ‘public recognition’ of a titled professional. Nevertheless, all of the skills, education and experience I have gained in my lifetime of work, has now been transferred into other activities which continue to help and educate people in the broader community. I am still me!”</td>
<td>Pre-retirement: She identified with work role, also used personal characteristics to describe the ‘self’. Now: A sense of loss because her job title is ‘lost’, but still feels the same; sees the transference into volunteer activities; her ‘me’ is greater than the work role and her ‘me’ appears to be expanded into volunteer role.</td>
</tr>
<tr>
<td>Female, Age 64</td>
<td>“A government employee who was not particularly taken with the work assigned, but who did well and enjoyed the people she worked with.”</td>
<td>“A retiree who enjoys her freedom (does not miss working) and has gotten involved in volunteer work that is a little too much, but is quite rewarding in spite of that.”</td>
<td>Pre-retirement: She saw herself as a government employee, ambivalence about the work but enjoyed the social connection. Now: She sees herself as a retiree and an active volunteer who has found rewarding activities.</td>
</tr>
<tr>
<td>Participant Demographic Characteristics</td>
<td>Description of the Self During the Year Prior to Retirement</td>
<td>Description of the Self at the Time of the Survey</td>
<td>Career Self-Concept Change</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>-----------------------------------------------------------</td>
<td>-------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Male, Age 56</td>
<td>“My working self is not gone. I had a good job, secure, that paid enough for me to do what I wanted. The job required nothing of me, outside of work hours, and during work hours there was ample time to think about and organize what I would be doing with my time after work. My connections at work were often an asset to my other activities. To my knowledge, I was not defined by my job.”</td>
<td>“I now have the time to do more of the things that I want to do. I do not have the inconvenience of a work schedule to juggle. I see few of the people I worked with now, but will stop by to visit if I am nearby (not at work, where they live). For the most part I would say, and I think others I know would agree, that I am not much different. My priorities have not changed. I also have many more things I want to do, so time seems tighter now than it was while I worked … [If] they ask [what do you do?]. The easy answer is ‘retired’; the glib answer is ‘What I want.’ If they ask, ‘How do you spend your time?’ I answer, ‘More time at Habitat [for Humanity], more time at Church, more time with wine, and I am trying to clean the basement.’”</td>
<td>Pre-retirement: Work role is only part of his self; other activities appear just as important. Now: Doing things; continued connection to work colleagues; volunteer role is present, however, seems to time and to have balanced many things in life. This is similar to how he described himself prior to retirement as well.</td>
</tr>
<tr>
<td>Male, Age 58</td>
<td>“Technology manager with staff that is responsible for contracts, processes and budgets; a father and husband; well settled, established and comfortable in life.”</td>
<td>“Father and husband, an active volunteer with various organizations, largely in supporting roles, and somewhat unsettled due to lack of clarity for my future activities. [I am] more physically fit and physically active.”</td>
<td>Pre-retirement: He mentions both work and family roles; described comfort with life situation. Now: Family and volunteer roles mentioned; he stated he is volunteering in supportive roles; unsettled with the adjustment; physical characteristic mentioned.</td>
</tr>
</tbody>
</table>
Other participants wrote:

I was very successful in my career with lots of positive reinforcement. I realize that I miss that but not as much as I thought since I more readily use my own ‘yardstick’ to measure my contribution. (Female, Age 59)

The first year or year and half was very difficult. [It was difficult] finding enough to do to fill the days and things to do that would be fulfilling. I think I needed a purpose and I needed to learn to relax and just enjoy. (Female, Age 59)

Finally, two participants commented on changes in volunteering during life:

The role and involvement of the extended family/especially grand children/aging parents all are important factors in determining the choice of volunteer activities we are involved in. (Male, Age 62)

While I have volunteered most of my adult life it did shift from those things associated with and for my kids e.g. sports coaching, school board, etc and after they grew I pursued my real volunteering passions of content and impact and interspersed with some ‘obligatory’ volunteering through my corporate role e.g. Art gallery Board, Municipal Committees etc. (Male, Age 58)
Research Question 7: Relationship of Career Self-Concept Scale to Other Variables

The responses to the 10 Likert-type career self-concept items are summarized in Table 6.18. In addition to being of interest as individual items, these items are also intended to form a scale, providing a summary index of career self-concept for each respondent. The item response theory analysis of these 10 items based on the full sample of participants is in Appendix K. These analyses showed that Cronbach’s alpha for all 10 items was .66; further analyses suggested that a subset of 7 of the items produced a more internally consistent scale, with a Cronbach’s alpha of .76. These items are indicated in Table 6.18 by asterisks. Based on these items, a summary index of career self-concept was computed for each respondent as the average response across these items. This index had a mean of 4.12 and standard deviation of 0.49, and male \( (M = 4.12, SD = 0.50) \) and female \( (M = 4.12, SD = 0.48) \) participants’ had the same mean scores.

Table 6.18

10-Item Career Self-Concept Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Item Abbreviation</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Somewhat Agree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I think of myself as a retiree from my paid work</td>
<td>Think</td>
<td>9</td>
<td>32</td>
<td>39</td>
<td>73</td>
<td>61</td>
</tr>
<tr>
<td><em>I did not enjoy my paid work</em>*</td>
<td>Enjoyed Work</td>
<td>4</td>
<td>6</td>
<td>28</td>
<td>60</td>
<td>126</td>
</tr>
<tr>
<td>*I wanted other people to view me as capable and competent in my paid work</td>
<td>Viewed by Other People</td>
<td>6</td>
<td>3</td>
<td>8</td>
<td>72</td>
<td>123</td>
</tr>
<tr>
<td>*I put pressure on myself to be successful at work</td>
<td>Put Pressure on Myself</td>
<td>2</td>
<td>10</td>
<td>23</td>
<td>82</td>
<td>97</td>
</tr>
<tr>
<td>*My paid work was fulfilling</td>
<td>Work Was Fulfilling</td>
<td>3</td>
<td>8</td>
<td>17</td>
<td>73</td>
<td>113</td>
</tr>
<tr>
<td>Item</td>
<td>Item Abbreviation</td>
<td>Strongly Disagree</td>
<td>Disagree</td>
<td>Somewhat Agree</td>
<td>Agree</td>
<td>Strongly Agree</td>
</tr>
<tr>
<td>------</td>
<td>------------------</td>
<td>------------------</td>
<td>---------</td>
<td>---------------</td>
<td>-------</td>
<td>----------------</td>
</tr>
<tr>
<td>*My paid work was only important for the money it provided **</td>
<td>Money</td>
<td>5</td>
<td>9</td>
<td>23</td>
<td>86</td>
<td>91</td>
</tr>
<tr>
<td>When I was working, I had other roles in life that were more important to me than my paid work role was **</td>
<td>Other Roles</td>
<td>28</td>
<td>69</td>
<td>56</td>
<td>52</td>
<td>9</td>
</tr>
<tr>
<td>*My success in my paid work was important for my self-esteem</td>
<td>Success</td>
<td>1</td>
<td>5</td>
<td>29</td>
<td>113</td>
<td>66</td>
</tr>
<tr>
<td>*I took pride in my work</td>
<td>Pride</td>
<td>1</td>
<td>3</td>
<td>4</td>
<td>66</td>
<td>140</td>
</tr>
<tr>
<td>My paid work was the most important thing in my life</td>
<td>Work Most Important</td>
<td>22</td>
<td>89</td>
<td>62</td>
<td>34</td>
<td>7</td>
</tr>
</tbody>
</table>

Notes. *These items formed a more internally consistent 7-item scale measuring career self-concept. **These items were reversed for all calculations.

To investigate Research Question 7, career self-concept scores for the participants who did use paid work skills in their volunteer activities were compared with those who did not, across each skill set. Only those participants who reported using the skill in paid work were assessed for volunteer skill usage. Statistically significant differences were found for two skill sets: development skills (e.g., developed new programs) and producing or repairing things (e.g., mechanics). For development skills, those who did use their work skills in their volunteer work ($M = 4.22, SD = 0.47$) had higher career self-concept scores than those who did not ($M = 4.06, SD = 0.53$), $t(149) = 1.996, p < .05, \eta^2 = .026$. This is a small effect size.

For producing or repairing skills, those who did use their work skills in their volunteer work ($M = 3.76, SD = 0.58$) had lower career self-concept scores than those who did not ($M = 4.27, SD = 0.41$), $t(20) = -2.189, p < .05, \eta^2 = .193$. This is a large effect size; however, for
producing or repairing skills, career self-concept scale scores were not in the direction hypothesized.

Career self-concept scores and knowledge use were also analyzed. Career self-concept \((M = 4.09, SD = 0.52)\) for participants who used knowledge was not significantly different than the score \((M = 4.20, SD = 0.39)\) for those who did not, \(t(128.266) = -1.727, p = .09\).

To further investigate this question, a few other variables were examined in addition to skills and knowledge. To evaluate the relationship between career self-concept and consciously chosen volunteer activities related to work, two groups were formed with related to paid work and somewhat related to paid work combined as Group 1 \((M = 4.31, SD = 0.25)\) and not related to paid work in Group 2 \((M = 4.06, SD = 0.47)\). The response Did not give this much thought was eliminated because the interest was only in those participants who had consciously considered their skills. Group 1 had significantly higher career self-concept, \(t(41.64) = 2.355, p < .05, \eta^2 = .118\). This is a medium effect size.

Participants’ descriptions of “Who I Am” at the time of the survey were coded for evidence of Super et al.’s (1996) roles. Two groups were formed with the roles of worker, retiree, volunteer and retiree/volunteer in Group 1 \((M = 4.17, SD = 0.46)\). These roles were compared to the self-identified roles of leisurite, student and family member in Group 2 \((M = 3.84, SD = 0.55)\). Group 1 had significantly higher career self-concept, \(t(189) = 2.816, p < .01, \eta^2 = .040\). This is a medium effect size.

**Summary**

This chapter examined the results of the Phase 2 survey, which explored whether there is a connection to previous paid work through volunteer activities or a desire to do something new and learn new things. The findings indicate that all of the skill sets in previous paid work were
significantly related to the skills used in volunteer activities. The majority of retirees who completed the survey had volunteer-related goals. The two most unexpected findings were that the Career Self-Concept Scale was not related to knowledge use or to use of most skill sets and that retirees are not pursuing either role continuation or a new role; rather, the roles of worker and learner exist simultaneously. The findings of this phase of the study will be discussed in more detail in the next chapter.
Chapter 7: Discussion

“The best way to find yourself, is to lose yourself in the service of others.”
Mahatma Gandhi

“You make a living by what you get. You make a life by what you give.”
Winston Churchill

“As a general principle, all older adults should have opportunities to be engaged and productive if they have the ability and desire to do so.” (Morrow-Howell et al., 2004, para. 1)

Morrow-Howell’s quote is a call to the wider society that older adults should be able to pursue the productive roles of paid work, volunteer work and caregiving, as they so desire. Mahatma Gandhi’s and Winston Churchill’s quotes also speak to the rewards and the value gained by volunteering.

This chapter discusses both phases of this study. It begins by revisiting the characteristics of the sample and summarizing the findings for the research questions posed at the beginning of this study. The summary is followed by a discussion of Super’s (Super et al., 1996) life-span, life-space career development theory, and in light of these findings, a series of recommendations are presented which further develop this theory to better reflect the experiences of retirees in our Western society. Next, the policy implications will be discussed. Then, this study’s limitations will be presented. Finally, this chapter ends with recommendations for future research and a concluding note.

Summary of the Results

Participant characteristics. The results indicated that the Phase 1 and Phase 2 participants were altruistic; they wanted to give back to their community through their volunteer
work and they demonstrated a high commitment to their activities with the high amount of volunteer hours. As mentioned in Chapter 2, Hall et al (2009) described top volunteers as those who contribute 171 hours or more annually. The participants in this study volunteered at least 3 hours per week and many of them would be considered top volunteers (Hall et al., 2009). Although the participants in this study wanted to be active and engaged and give back to their community, they were not all volunteering as much as those in Kaskie et al.’s research did which was 5 hours per week; hence, whether they would be similar to those these researchers described as in a civic engagement retirement role is uncertain. A high proportion of participants in Phase 2 had university degrees; they were more highly educated than those in the CSGVP (Statistics Canada, 2007b). Similarly, a high proportion had incomes of $100,000 or more. Is this segment of society able to volunteer because it is a pursuit they can afford to do? Although some respondents indicated that they had lower levels of household income, others could afford not to be paid for their work. Some of the participants, however, indicated that they continue to work part-time because one of the biggest difficulties with the retirement transition was having less money:

I had a problem getting used to living with a budget, which I had not done before. (Phase 2, female, Age 62)

Having less disposable income and worrying about money. (Phase 2, male, Age 62)

The money, which is why I went back to teaching part-time. (Phase 2, female, Age 56)

I feel volunteer work is very important but it would be good to receive small paid contracts sometimes in view of the economic situation. Community organisations are under paid and do very meaningful work. (Phase 2, female, Age 67)
While the Phase 1 sample was Caucasian, eight percent of participants in Phase 2 self-identified as belonging to various ethno-cultural and racial groups. In addition, more participants in this study were immigrants to Canada when compared to the CVGVP (Hall et al., 2009). The majority of participants who reported that they were born outside of Canada indicated that they came from European countries and this is also the case with the overall population of seniors age 65 and older (Statistics Canada, 2007b).

The Phase 2 participants, like those in Phase 1, tended to volunteer throughout life. This reflects the life course perspective where the volunteer experiences of the retirees can be viewed as a continuation of their career trajectories and a continuation of their life course. Approximately 23% of Phase 2 participants have been volunteering for more than 30 years. Volunteering has been a part of their lives for a long time. Only six percent of participants were involved in volunteering for 2 or fewer years. Twenty percent volunteered for five to nine years, and for many of these participants, this would have coincided with their transition into retirement. In Phase 1, 10 participants volunteered during their working careers, and 2 out of the 12 participants had begun volunteering at retirement. The participants tended to volunteer with certain types of nonprofit organizations, with the majority of them volunteering with social services agencies. Similar to the findings of other research (Corporation for National and Community Service, 2007), while the participants did engage in some religious volunteering, this was not the most reported category and this may represent a change in where older volunteers are devoting their hours.

A large number of participants reported that they used management and leadership skills in their paid work. While former job titles were not requested in the survey, this finding regarding skills may indicate that there were many participants who used higher level skills in
their paid jobs and that the sample was skewed in that direction. Other research has also indicated that individuals in professional jobs tend to volunteer more often than those in manual labour and trades occupations (Choi, 2003; Tang, 2008; Webb & Abzug, 2008). Is this due to a lack of discretionary time among those in manual labour and the trades? Is it reflective of a lack of volunteer history among those in manual labour and the trades? Do individuals from certain occupations feel they have few skills to offer through volunteering? These are questions that might be explored in subsequent research.

As previously explained, the seven research questions were developed using concepts and ideas from Super’s life-span, life-space theory of career development (Super, 1990; Super et al., 1996) and career development theory is used as a synonym for Super’s theory.

**Research Questions Results Summary**

1) **Do retirees use the skills and abilities that they developed through their paid work experiences in their volunteer activities?**

This study assessed whether retirees used their paid work skills in their volunteer activities. The skill sets were recoded and analyzed according to whether they were used ‘ever’ or ‘never’, and these findings were significant for all skill sets at the p < .001 level. The participants tended to remain in their comfort zone with regard to the skills they were using, and this was seen with the higher-level skills, for example, leading and governing, and managing, as well as for basic skill sets such as those that involved repairing things and operating machinery. The participants reported that while volunteering they were often leading, teaching and educating, training, managing and serving others. They continued to use many of their previous skills and abilities in a new setting, suggesting that there is continuity of career for those who volunteer.
The use of pre-retirement skills and abilities in volunteer activities matches Price’s (2003) findings that her 14 women participants reported that one of the aspects of a more positive retirement adjustment was their use of previous skills in their volunteer activities. This use of skills made them feel more productive. The Phase 2 survey findings matched the findings in the Phase 1 case study where the vast majority of participants also stated that they saw connections between their previous paid work and their volunteer activities. The finding that skills and abilities were transferred from paid work to volunteer activities among this larger survey sample was important for verifying the previous findings in Phase 1. In Phase 1, the exception was Participant 11, Glen, who did not enjoy his previous paid work; this unexpected finding was important not only for the development of the survey, but for the study as a whole because it is something that has implications for volunteer management.

Of all the skill sets, management skills did not follow the pattern of transferability to the same extent; that is, comparatively few of the retirees who used management skills in their paid work transferred them to their volunteer activities. However, when men and women were examined separately, the transference of management skills to volunteer activities was statistically significant for women. Approximately half of all the participants used management skills and leadership and governance skills in their previous work; however, leadership and governance skills use in volunteer activities did not demonstrate the same pattern. This may indicate that retirees are not asked to help manage others because the paid staff performs this function, whereas retirees are asked to sit on boards of directors and more frequently assist with the governance function. There are gender differences for the management skill set. It would be interesting to further examine these issues in subsequent research.
Also, approximately a quarter of the participants stated that there were skills and abilities that they wanted to use but they were not able to use them, and another 10% were unsure. The participants who wanted to use more of their skills reported that they wanted to use higher level skills that involve more responsibility, such as leadership skills, or they wanted to be more intellectually challenged. Mentoring, training and management skills were also mentioned. They stated that there was no opportunity to use these skills. This finding may indicate that some volunteers are underutilized, especially knowledgeable, highly skilled volunteers who have retired from full careers.

2) Do retirees use the knowledge that they developed through their paid work experiences in their volunteer activities?

The results of Phases 1 and 2 showed there was a wide variety of knowledge transferred from previous paid work to volunteer activities, including specialized professional knowledge. In Phase 1, knowledge types included environmental, health and safety, political knowledge, child development, adult development and aging, education, and government departments. In Phase 2, almost three quarters of the participants reported using their knowledge in their volunteer activities, with more than half of these participants indicating that they used knowledge regarding how to work effectively with other people. Specific examples they mentioned included knowledge of working with diverse groups, working in teams, resolving conflicts, managing people and the use of good communication techniques. Other types of knowledge were also reported including administrative, learning and education, governance and leadership, financial knowledge, computer knowledge, and health-related/medical knowledge. Skills, abilities and knowledge are closely connected and participants’ answers to this question overlapped with some of the types of skills and abilities reported for Question 1. The finding that knowledge was
transferred from paid work to volunteer activities with this larger sample of survey participants was important; this verified the findings of Phase 1.

3) Are the contexts of retirees’ paid work experiences and their volunteer activities similar?

Contextual factors were also examined, to see if there was a connection between client populations and physical work locations. When compared to their paid work, 43% of participants worked with a similar population in their volunteer activities. Only one third of participants worked in a similar location. This finding differs from those of the Phase 1 case study where more than half of the participants reported either working with a similar population or in a similar location. Other contextual factors could be examined in future research such as the establishment of a similar structure or work routine through volunteer activities. Some retirees described themselves as full-time or professional volunteers. This may indicate that they are maintaining similar work hours and a routine, much like they did before they retired. A couple of participants described a need for structure in their lifestyle:

[Most difficult aspect of the transition to retirement was] finding the balance between having enough free time to be spontaneous and flexible and having enough structure so that I feel that I am accomplishing something worthwhile.
(Phase 2, Female, Age 67)

This need for structure and the creation of a work day similar to what they had before was seen with the Phase 1 participants, since some of the participants who put long hours into their paid work also contributed large numbers of hours to their volunteer activities.
4) What learning goals do retirees have through their volunteer activities?

Super et al.’s (1996) theory indicates that the student role is present throughout life. In addition, if retirees do not use their strengths, they might be pursuing new things and be engaged in lifelong learning. In Phase 1, the aim of research question four was to determine the retirees’ opportunities for learning. They related several areas of learning; however, the question may have made them think of formal learning or they may have had some trouble describing their unintentional learning. Although all of them were able to answer the question, they seemed to need time to reflect on this topic. While the question was open-ended, it may have just been an unexpected question, or the wording of the question or the timing of the question may have been a factor in their unexpected response. It was felt that this question did not elicit the kind of response desired and a new question that would draw out self-directed learning was designed to replace this one.

In Phase 2, the focus was on specific learning goals and the question was introduced to survey participants after the openness to learning instrument was given. Seventy-five percent of the retirees identified and described their learning goals. They expressed a diverse range of goals which were classified along the revised five dimensions of learning. The majority of these goals involved informal learning; however, a few retirees recounted formal learning that involved taking college or university courses in order to obtain training for their volunteer activities.

Most of the retirees revealed goals that contained cognitive or social dimensions, although a few retirees described multifaceted, holistic goals. The most common learning goals were cognitive and cognitive/physical, closely followed by cognitive/social/emotional and social/emotional goals. Volunteering is one avenue for personal growth and cognitive stimulation during retirement and examining goals for learning is one way to measure cognitive stimulation. Since the student role is one of Super et al.’s (1996) life roles, by having learning goals related to
their volunteer activities, the retirees maintain lifelong learning opportunities. Learning is important for mental stimulation; however, as this process of categorizing the retirees’ learning goals indicates, all five dimensions can be stimulated. In fact, some recent research has found cognitive, social and physical benefits from volunteering (Fried et al., 2004; Karp et al. 2006). Some of the retirees recognized that learning occurs everywhere, whether or not there are any specific learning goals. This reflects the fact that learning does not have to be intentional, whether it is conscious or unconscious (Schugurensky, 2000).

Participants used their skills, abilities and knowledge and had set goals for new learning in their volunteer activities, so they were engaged in lifelong learning and using their strengths. This is a key finding of this study. In Super et al.’s (1996) theory, the roles of learner (student) and volunteer (citizen) were being played simultaneously. In their work, Sinnott and Berlanstein (2006) theorize that individuals paradoxically desire both continuity and change, and this seems to be what the participants not only strived to achieve, but have actually accomplished. However, these findings do not match those found by Nimrod and Kleiber (2007), where the participants either pursued something innovative and new, or maintained continuity.

While the majority of retirees who completed the survey shared their volunteer-related goals, 25% of participants did not identify any learning goals. This may be due to an assumption that learning is formal education or a dismissal of unintentional learning; hence, a lack of understanding regarding a broad-based definition of learning could have contributed to this finding (Schugurensky, 2000; Schugurensky et al., 2010). While learning opportunities are not what drives retirees’ choice of volunteer activities, the majority of retirees were open to learning, and learning was viewed as important for mental stimulation.
Previous research highlighted how learning and volunteering connected older adults to others, and this was associated with people feeling healthier and happier (Canadian Council on Learning, 2006). The current study also found a lot of evidence of the social dimension in retirees’ volunteer-related learning goals, with 37% of learning goals containing a social element, while 57% of goals contained a cognitive element. The emotional dimension was often paired with the social dimension, where retirees identified a social context or a specific group that they were learning along with or through. In some instances, they were learning about themselves through others. The feeling of connection that these retirees gained from their volunteering and learning appeared to encourage them to expand their horizons and try new pursuits, indicating the importance of feeling connected because it influences and is influenced by adult development and learning (Sinnott & Berlanstein, 2006).

Adults have lifelong learning needs (Hoare, 2006) and research indicates that engaging in mentally stimulating leisure activities is associated with higher intellectual functioning (Schooler & Mulatu, 2001). With new research also pointing to the protective factor that cognitive stimulation provides against mental decline in old age (Fried et al., 2004; Karp et al., 2006), a greater number of older adults will be seeking avenues for cognitive stimulation. Having volunteer-related learning goals provided these older adults with enhanced mental stimulation as well as purpose and meaning in life. Not only did the types of learning that the participants engaged in provide cognitive stimulation, but based on the coding of the types of learning participants engaged in, other dimensions were also stimulated. Recent research has shown that physical, social and mental stimulation in leisure activities protect against dementia risk (Fried et al., 2004; Karp et al., 2006; Verghese et al., 2003). Learning that is focused on the social dimension is very powerful, providing many benefits and enabling learning through volunteering.
to assist adults in meeting their developmental needs for feeling connected within the self, feeling connected with others, and feeling connected with something or someone larger than the self (Sinnott & Berlanstein, 2006). In this study, the learning goals that were coded as emotional learning also seemed to promote these feelings of connection. There appears to be a developmental need for connection (Erikson, Erikson & Kivnick, 1986; Sinnott & Berlanstein, 2006), and thinking about and reflecting on the self may promote this. A female participant in Phase 2, age 63, said: “I believe that I have grown as a person in the past decade – in my knowledge of self and others and because of circumstances “given” to me.” While learning opportunities are not what retirees’ primarily feel drives their choice of volunteer activities, learning is important to them for mental stimulation and the findings reveal that there is a lot of learning going on that was not known or previously recognized.

Retirees who volunteer can pursue lifelong learning goals and achieve the mental stimulation they desire. The need for connection in learning was evident (Erikson, 1986; Sinnott & Berlanstein, 2006) and retirement is a time of life that enables adults to reflect and consider large, complex questions about themselves and meaning in life. Studying these issues among participants who are in this life stage appears to be an ideal time to examine the connections between lifelong learning, the self, community and volunteering.

5) What factors most contributed to retirees’ choice of volunteer activities?

The participants were asked to choose which of several factors most contributed to their choice of volunteer activities. Most participants reported that they chose activities in order to contribute to community or to society or to remain active and engaged. Believing in the cause or being personally affected by the cause was also a key factor. These were the factors most often mentioned, and together they represent 90% of responses. Although Super et al.’s (1996) theory
generated several avenues for investigation, in total, only 10% of participants stated that using their skills, abilities, knowledge or learning something new most contributed to their choice of activities. Like the Phase 1 participants, these Phase 2 participants wanted to give back to their community and/or to remain active and engaged. In their comments regarding this question, some participants stated that more than one of these factors or all of them contributed jointly to their choice. Their reasons for choosing volunteer activities were nuanced and not due to one single motivation. The CSCGP (Hall et al., 2009) also asked respondents about their reasons for volunteering and also found that those age 55 and older reported they volunteered for a number of reasons in combination, from most often reported to least: To contribute to the community; to use skills and experiences; affected by the cause; to meet people; friends volunteer; explore own strengths; religious obligations; to improve job opportunities.

In order to further contextualize participants’ choice of volunteer activities, they were asked if they had consciously chosen volunteer activities related to their paid work. Approximately a quarter each of participants indicated that they had consciously chosen volunteer activities related to their paid work (25%) and not related to their paid work (24%). Approximately half of the participants did not give this much thought.

Most of the survey participants reported that their volunteer activities developed serendipitously, through opportunities that they had. Thirty percent of them stated their volunteer activities developed through a planned approach. Careers can also develop through chance opportunities, rather than being planned (Chen, 2005; Heinz, 2004). More than 40% of participants indicated that someone had asked them to volunteer or help out at a nonprofit. This figure is less than the 86% of those age 55 and older who reported someone asked them in the CSGVP (Hall et al., 2009).
In Phase 1, Participant 3 indicated he did not intentionally want to use his skills and abilities in his volunteer work, yet that is what he did. This may have been an example of chance or happenstance in worklife (Chen, 2005); it was not intentional or planned on his part.

As discussed in chapters 3 and 5, human agency and the variables of intention and forethought, and self-reflectiveness interact and shape one’s direction in life and the choices made within the constraints and opportunities of history and social circumstances (Bandura, 2001; Chen, 2006; Elder & Johnson, 2003; Giele & Heinz, 2004; Marshall, 2005). Adults bring a history of life experiences to their choices and actions, and these influence paths taken in life. In addition, there is the notion of ‘chance’ or unanticipated events (Chen, 2005; Jonsson et al., 2001), and the Phase 2 participants reported a lot of serendipity in their experiences with volunteering. Interestingly, the questions on consciously choosing volunteer activities related to paid work, planning versus serendipitous opportunities, and being asked to volunteer demonstrated no relationship, so that planning did not include conscious planning regarding a connection to previous work and being asked did not relate to opportunities or to being asked because of wanting to use one’s skills and knowledge, so that from their perspective, the participants saw no relationship between these variables. Based on the results, there appears to be a ‘chance’ factor present in volunteering, one that the participants in both phases were not conscious of (Chen, 2005). Does this mean that participants planned to volunteer, but this planning was done without considering their own expectations or exploring volunteer opportunities? Does this present opportunities for nonprofit organizations or is it a disadvantage that potential volunteers have not thought this through? Should volunteer managers spend more time helping potential volunteers to contribute their time with intention? Will this increase volunteer engagement and retention? These issues warrant further study by examining the
process involved in the choice of activities, including conscious planning and serendipity, to help inform volunteer recruitment.

Finally, the Phase 2 participants reported high well-being and felt their volunteer activities contributed to their enjoyment of life. This matches the findings of previous research (Everard, 2009; Moen & Fields, 2002; Warr, Butcher & Robertson, 2004).

6) Do retirees’ career self-concepts change through their volunteer activities from those they developed during their paid-work careers?

In Phase 2, the participants’ descriptions of themselves were classified along the six roles described in life-span, life-space career development theory by Super et al. (1996). Phase 2 indicates that the participants underwent a transformation in their sense of career self-concept during their transition to retirement as they became engaged or more engaged in volunteer roles. The results indicate that most of the participants who identified with the worker role during the year prior to their retirement perceived themselves as volunteers at the time of the survey. Overall, out of the 190 participants who could be classified along roles, almost 22% reported a transformation from worker to volunteer. When all previous roles are examined, 52% reported that they currently saw themselves as volunteers. Volunteering provided many participants with a new role and some participants referred to themselves as ‘almost full-time volunteers’ or ‘professional volunteers’. This labelling in conjunction with the volunteer role was also seen in Phase 1 where one participant perceived himself as a type of community volunteer: “community volunteer...community leader...community activist...community convener...I am a community-minded guy”. These labels suggest a new sense of self, but the key aspects of the paid-work role remain – the skills, abilities, knowledge, and all of the strengths. As noted, participants reported that these were transferred into their volunteer activities.
Most of the Phase 2 participants’ self-identified as volunteers; some of them saw themselves as full-time volunteers or professional volunteers. Some participants described themselves as retirees from their previous paid work, and some described themselves as retirees and volunteers. An important part of these participants self concept was being retirees from their previous paid work; for example, they referred to themselves as a retired teacher or educator.

Eight percent described themselves as workers in this section of the survey. This finding makes sense because, when asked about their current labour force status, approximately an equal percentage reported that they were retired but had continued to earn income through new paid employment.

The survey results indicate that there was a synthesis between the worker and volunteer roles. Participants remarked that key characteristics that make them who they are and entailed what they have to offer have been transferred to their volunteer activities: “Now, I am still driven, detail oriented and a bit of a workaholic but now I apply these characteristics to my volunteer work” (Phase 2, Female, Age 55). They are still essentially themselves, despite the change from paid work to volunteer and community activities:

I am still the same person I was; only now, there is not the "public recognition" of a titled professional. Nevertheless, all of the skills, education and experience I have gained in my lifetime of work, have now been transferred into other activities which continue to help and educate people in the broader community. I am still me! (Phase 2, Female, Age 63).

One unexpected finding was that age discrimination and ageism were reported spontaneously in Phase 1 and Phase 2 even though no specific questions were asked about this in the survey or questionnaire. In Phase 1, negative and even disparaging comments came from unexpected individuals – former co-workers and even their own children. One Phase 1
participant reported dismissive comments (Hendricks, 2005) that impacted his sense of self. Being confronted with ageism can impact the sense of self and self-esteem (Hendricks, 2004, 2005). The following comment came from a 69-year-old woman in Phase 2:

One experience that I had never realized would happen to me is being “invisible” to some people now that I am 69 and my hair is grey. Young people tend to push me aside. Others go in front of me in line-ups or into doors of stores. Doors just fall back in my face unless I catch them. The post office person the other day just reached over me to take parcels and letters from the young person behind me. When I explained that I was next in line, the post office clerk just said that is the way it is because the pickup truck was coming and I could miss the pickup, but others could not. Thus sometimes I wonder why it is I still want to “give back” a little to this kind of society. I still respect my elders, and expect that I will be respected, but even slow, kind, caring Victoria, B.C. sometimes seems to be shifting in directions that I dislike.

This observation, assuming that it is more general, should be investigated further in future research because the number of older adults will continue to increase and our society needs to adjust to their expectations for engagement and active participation in the community and in the workforce (Freeman, 2002; Hendricks, 2004, 2005).

7) Are retirees’ career self-concepts related to the utilization of skills, abilities and knowledge derived from volunteer activities?

These participants are altruistic and high on career self-concept, and the fact that all participants scored moderately to high on career self-concept may have caused the unexpected results for this scale. The career self-concept scale was related to participants’ descriptions of themselves, and this indicates that this index is measuring their sense of self related to work, or their career or working self.
Many of the variables expected to have a relationship with the career self-concept index were not significantly related, and this is probably due to there being little variability among participants on this scale. Only development and production or repair skills showed any relationship to the career self-concept index. These results were unexpected because the low variability among participants on career self-concept was unexpected. Consciously choosing to use paid work skills was related to the career self-concept scale and this indicates that those who consciously chose to use skills related to paid work had higher levels career self-concept. This finding indicates that this index appears to measure career self-concept and it provides support for the transference of paid work into volunteer activities.

The career self-concept index requires further testing. In order to determine the usefulness of this measure for placing potential older volunteers, further research needs to be done. Ideally, to evaluate this measure, a group of volunteers and non-volunteers needs to be studied to assess career self-concept. It is important to obtain a sample with a wider range of scores on this scale and then, the scores can be compared to see how the older volunteers’ scores relate to their use of skills and knowledge in their volunteer activities. This will assist in determining if this index is useful and practical for volunteer managers, human resources managers, and perhaps financial planners, to use with older adults.

**Super’s Theory Development**

The theory of career development was used in this study to examine retirement. Taking this unique perspective has provided many insights into the experiences of retirees who volunteer with nonprofit organizations. In our aging society, and under current economic circumstances, an examination of volunteering using career development theory has proven to be very useful.
Career development theory provided a unique perspective on retirees and volunteering and assisted in providing a better understanding of this issue with all of its complexities and nuances. This study demonstrates that there is much more career transfer, or continuity, in combination with informal learning going on than we previously recognized.

This study indicates that retirement is another stage of career development for retirees who were volunteering, whether or not they were also engaged in paid work. Career development across the life course has changed. Today's retirees, who can expect 25 to 30 years of productive life, want to continue using their skills, abilities and knowledge in their volunteer activities. They do not want to see an end to their working selves. For many retirees, volunteering is another career. In fact, retirees’ comments indicate that they view volunteering as a new job, and for some it is full-time:

I didn’t find [the transition to retirement] hard. I don’t use the word “retired”, as I actually work longer hours than I did when I was employed by someone else.
(Phase 2, Female, 65)

There was no difficulty as I prepared for my retirement during the previous year of my employment, volunteering in my spare time and taking training on weekends to take on a new role when I retired officially. (Phase 2, Female, Age 65)

For those who choose it, volunteering can be a wonderful activity to pursue in order to help other people and give back to society. This study attempted to answer whether there is a connection to previous paid work through volunteer activities or a desire to do something new and learn new things. The findings suggest a continuity of career for those who volunteer. They continue to use their skills, abilities and knowledge in a new setting and this is true across a range of skills, abilities and knowledge types.
Super et al. (1996) wrote about the importance of transitions from one stage to the next, and retirement is a transition. In today’s economic and socio-demographic reality, viewing retirement as another stage in career development makes sense. Just like times have changed, career development across the life course has changed. Individuals generally have several careers throughout their lives and older adults’ volunteer activities during their retirement years have taken on a new meaning and importance as their longevity increases. For some, it is like a ‘second’ career, where they are highly dedicated and committed and put in many hours because the volunteer activities are very rewarding and meaningful.

As Super et al. (1996) demonstrate in the Life-Career Rainbow, the roles of worker and learner can co-exist simultaneously. The retirees in this study transferred their skills, abilities and knowledge and thus have continuity of their career-self and they want to learn new things.

In Chapter 3, the argument was made for using Super’s life-span, life-space theory of career development (Super et al., 1996) to examine retirees who volunteer with nonprofit organizations and to develop the Disengagement stage of the theory, which has not received much attention. Super et al. were proponents of using empirical data to support or refute theory. This research used Super et al.’s theory as a lens for examining volunteering among retirees and this unique perspective has provided many insights which will be summarized. Taken together, these findings indicate Super et al.’s theory can be developed to better reflect the experiences of the current generation of retirees.

In examining retirees who volunteer, knowledge was added to Super et al.’s (1996) theory as an important concept because, unlike youth who were generally the focus of this theory previously, retirees have developed knowledge over their careers (David & Foray, 2002). Career self-concept evolves, skills and abilities are developed and knowledge is applied. Skills and
abilities are related to knowledge, and these mature to form career self-concept; hence it was important to investigate all of these concepts in this research. Using the roles described in Super et al.’s theory and modifying them for older adults was important for categorizing the retirees’ sense of self and examining how sense of self evolves during the transition from paid work into volunteer roles. This process is comparable to Super et al.’s description of self-concept implementation that occurs as young people choose an occupation that is a good match for them.

Within career development theory, life-span refers to the social positions and roles that individuals hold (Super et al., 1996). The roles of worker, learner, family member, citizen, retiree, and leisurite are evident throughout life, and these roles were used to code the data for research question 5. Although it would be incorporated within the family role, very few of the participants referred to themselves in the child role. In Phase 2 one female participant, age 73, said she provides care to older family members who are most likely her parents or her in-laws. One female participant, age 69, said that her dad died, and one mentioned her father-in-law died (female, age 59), and in Phase 1 one female participant talked about her mother’s death. Other than these four examples, this role was not visible in the data.

Volunteering throughout the life-span can itself be viewed as containing phases, similar to a career. There are changing preferences for changing situations and these occur successively, leading to a new or better match with the career self-concept for each new life situation that occurs (Super et al. 1996). One respondent’s comments illustrate this pattern:

While I have volunteered most of my adult life, [my volunteering] did shift from those things associated with and for my kids; e.g., sports coaching, school board, etc., and after they grew, I pursued my real volunteering passions of content and impact, and interspersed with some ‘obligatory volunteering’ through my corporate role, e.g., Art gallery Board, Municipal Committees, etc. (Phase 2, Male, Age 58)
This respondent described separate phases of volunteering, where the choice of activity was influenced by a life role that was the priority and by extrinsic factors such as work and children and intrinsic factors such as passion and interest. These phases of volunteering are similar to a career where new employment is undertaken in succession to achieve different career goals. Unfortunately, this participant does not comment on his career self-concept here, so it is not possible to know more about the process of ‘self’ development that occurred through these experiences; however, this means that volunteering during retirement would represent a new phase with a new set of volunteer activities that better match the new, evolving career self-concept (Super et al., 1996). This evidence suggests that volunteering during retirement could be interpreted as a new ‘career’ not only for those individuals who are putting in 20 or more hours of volunteering a week and treating volunteering like a job, but more importantly, for those who are developing a new career self-concept through this process, through exposure to different experiences similar to the example described above.

In career development theory, life-space refers to the stages outlined by Super et al. (1996), which are: Growth, Exploration, Establishment, Maintenance, and Disengagement. The stage of Disengagement is the stage that involves the developmental tasks for retirement, and Super et al. describe these as deceleration, retirement planning and retirement living. Deceleration involves declining activity, turning over tasks to colleagues and thinking about retirement. Increasing focus on retirement planning leads to a separation from work and occupation. Retirement living involves the development of a new lifestyle and life structure. Super et al. also discuss transitions, role interaction and life redesign, and mention that each transition itself involves re-exploration and reestablishment. Then, individuals in a new stage generally recycle back through the stages in a mini-cycle. The mini-cycle tasks for older adults
during the retirement stage are: reducing work hours, keeping up with what is still enjoyed, doing things one has always wanted to do, finding a good location for retirement, and developing non-occupational roles.

Super et al.’s (1996) theory of career development emphasizes “continuity in human development and focuses on the progression of choice, entry, adjustment, and transition to new choice over the entire life cycle” (p. 123). Later life is a large and growing part of the life cycle and the experiences of these participants need to be considered within this theory. The strong relationship of paid work skills, abilities and knowledge to those used in volunteer activities and the description of participants’ transference of sense of career self indicate that retirement is a stage of career redirection and renewal, indicating that there needs to be a further development and expansion of Super et al.’s (1996) theory. Based on the results of this study and the experiences of these participants, a new stage is required.

Building upon Super

This new stage is called ‘Redirection’. The experiences of these participants indicate that it occurs after the Disengagement stage. They had retired from their full-time career and were actively disengaging themselves from it. However, disengagement from their paid career seems to be the catalyst for the Redirection stage. Put differently, retirement and the impending disengagement from the sphere of work provide the crisis that lead into the stage of Redirection:

I really felt that I had lost my identity. My profession gave me my identity. Once I stopped working I truly wondered who I was. I was shocked by this as I didn't know that it would happen. I wish I had been warned but in retrospect, perhaps a warning wouldn’t have been sufficient. It was kind of the same when I became a mother. I was now so and so’s mommy (which was a good thing), but no one told me this would happen. I kind of laughed about it then. But I didn’t laugh when I retired and lost my identity. It really threw me. (Phase 2, Female, Age 68)
Participants struggling with this crisis feel anxious and in one participant’s words: “somewhat unsettled due to lack of clarity for my future activities” (Phase 2, Male, Age 58).

Another described “feeling useless” (Phase 2, Female, Age 66). These feelings propelled participants into the redirection stage. Redirection involves three tasks: redefinition, renewal and integration. First, it involves a self redefinition where retirees are forced to redefine themselves as their former work role is ending or has ended. This task is evident in the following quotes from four of the survey participants:

During the year before I retired I was aware that I was transitioning to a new phase of my life and I was worried about not being busy, not doing enough, being forgotten and looking at life instead of contributing to it. I am driven, detail oriented and therefore a bit of a workaholic. (Phase 2, Female, Age 55)

In the first few years of being retired, I did experience a loss of “identity”. I had taken an early retirement and missed my colleagues and the cerebral stimulation very much. However, changing my home location as well as retiring, while draconian, was actually a good move. It opened up other opportunities such as becoming a master gardener. I realized that I did not have to stop learning or living because I did not have a business career. (Phase 2, Female, Age 71)

Work was a big part of my life and defined me to a certain extent. (Phase 2, Female, Age 55)

The volunteer role becomes more important to participants:

In my short experience in volunteering, I think that [volunteering] does fill a void for many retirees, and I have found that most of the volunteers with whom I work are women. (Phase 2, Female, Age 64)

The second task in Redirection is personal renewal, where, over time, a new direction or path develops that provides purpose and meaning in life:
My [sense of] self as a mother and career person was slowly disappearing, and I began to feel insecure and small as I wondered how and where I would find fulfillment for the rest of my days. I did a great deal of exploring and joining to discover who I had become at this stage. Soon I realized what and where I wanted to be, and made decisions in the direction of satisfaction. (Phase 2, Female, Age 73)

I retired suddenly for health reasons and to feel I am still capable, I volunteer to give back to my community. I was not emotionally ready to retire and volunteer to improve my self-esteem and feelings of usefulness. I am a contributing member of my community. (Phase 2, Female, Age 58)

The first year or year and half was very difficult. Finding enough to do to fill the days, and things to do, that would be fulfilling. I think I needed a purpose and I needed to learn to relax and just enjoy. (Phase 2, Female, Age 59)

As volunteering grows in importance, it fills a void and provides meaning and fulfillment. The final task is integration and this is when the survey participants have formed a new sense of self:

For many of us our identity during the working years came from our family and our jobs. With retirement we lost that bit around the jobs and volunteering helped to fill the gap. But as time progressed the gap disappeared and our identity came more to rest as just plain “me”. I find it surprising to some extent that in conversation with new people I meet I very seldom ever refer to my retired profession of social work (Phase 2, Male, Age 67)

The survey participants have developed a ‘new me’:

I care for my children, stepchildren and grandchildren. I am a citizen of the world and promote human equality and respect. I am retired and have accepted that it is acceptable to have time for myself. (Phase 2, Male, Age 68)
I am a 69 year old female who has retired from paid work. I am still married with two adult children, a daughter-in-law, a granddaughter. I am a hospice community volunteer, Buddhist, socially concerned, yoga student, etc. I am the same as before retirement but with more free time and less concerned with what others think. (Phase 2, Female, Age 69)

Whilst doing the survey it became apparent to me that my volunteering is not the be all and end all that I thought it was, but how the “me” stuff I do gives me good balance in my life. (Phase 2, Female, Age 73)

Reintegration involves the creation of a ‘new me’ which becomes a source of self-esteem, creating a new lifestyle and new balance. Fulfilling the tasks of Redirection involve processes similar to those described as recycling through stages by Super et al. (1996). In fact, the participants who have developed a new “me” have designed a life style they are comfortable with and have found new avenues for fulfillment that provide meaning in life. They have achieved the tasks involved in the stage of Redirection:

I found it hard to give up the structure of my organized life and to give up my title and reputation in the work place. My career was a big part of my happiness, but I have come to realize it was what I did, not who I was. I am finding a new order and a new routine in retirement and am able to participate in so many new and exciting experiences in life. Travel is a new interest and more time with my husband is a very positive thing. I have the chance to not rush at making a nice meal and to "just be" is a new joy in my life. The old me had to be achieving or accomplishing at work or at home to be happy. The new me can just listen to music, go for a walk or read a good book to be happy. (Phase 2, Female, Age 60)

By choosing a life style that includes volunteering, they have chosen pursuits that give to the community but also give something to them. By volunteering, they feel wanted and needed. They know they are making a difference in someone’s life, in their community. When they go to
the nonprofit organization to volunteer, they have the sense not only that they are making a
difference, but that everyone knows their name. Overall, it provides a new life meaning, new
fulfillment and a new life direction. It is rewarding and psychologically uplifting:

Volunteering with different people makes your day seem worth it now. People
actually appreciate what I do and are glad to see me. (Phase 2, Female, Age 60)

Finding meaning and fulfillment is important during later life. These findings correspond
to Reis and Pushkar Gold’s (1993) statement that finding meaning in later life is critical. The
above comments also resonate with Super et al. (1996) “work satisfaction and life satisfaction
depend on the extent to which an individual finds adequate outlets for abilities, needs, values,
interests, personality traits and self concepts” (p. 125). The findings that the participants in this
study found meaning, fulfillment, commitment, passion, are engaged within a community and
using skills and knowledge connected to their previous paid work are similar to the types of
occupational engagement in retirement found by Jonsson et al. (2000).

Volunteering is an incredible opportunity, with endless possibilities for older adults to
become engaged and involved, for them to learn or maintain transferable skills, use their skills
and teach them to others, and provide mentoring. Retirees’ skills and knowledge are transferable
and nonprofits can capitalize on this.

These results suggest that there is not only a career within volunteering, but that there is
perhaps a developmental theory of volunteering across life. The tasks of volunteering change
across life. Early in life, volunteering is for skill development, during adulthood, volunteering is
because of loved ones, mainly children and activity in the community increases, during later
adulthood volunteering is pursued in order to give back to the community. This developmental
process leads to personal development and learning through volunteering throughout life. People
learn, develop and grow through activities such as volunteering which provide stimulation on multiple levels. Older adults do this too. Growth occurs and it continues during childhood and adulthood, in the workplace, in the school, in the community, and within nonprofits. These participants were learning and developing a new identity.

The participants were both using previous paid work skills and knowledge and learning new things. They were in the learner, citizen and worker roles, seeking continuity and change simultaneously (Sinnott & Berlanstein, 2006). There was more than one reason for their choice of volunteer activities.

By being engaged in volunteer activities and striving to be mentally active these older adults were maintaining mental acuity (Schooler & Mulatu, 2001). They were protecting their mental functioning by seeking out activities and interests, having learning goals and being mentally active. Overall their goal was just to be active and give back to their community. By being active, they are keeping the mind active. These participants are using assimilative learning; learning that builds on previous learning when they use their paid work skills and knowledge in their volunteer activities. It is a common concern and worry among older adults that they are getting Alzheimer’s disease or that their mental capacity is being diminished. Like the connection with paid work that Phase 1 Participant #5 mentioned, unpaid work such as volunteering, has been shown to be protective as well (Fried et al., 2004; Karp et al., 2006; Schooler & Mulatu, 2001; Verghese et al., 2003). Volunteering is good for society and older people because of these health benefits. Older people continue learning and being productive in ways beyond paid labour by contributing in vital ways to their community and society.

The participants discussed retirement and Super et al. (1996) mentioned retirement. Since both the retirement transition and the life stage of retirement have such an impact on older adults,
the next section will discuss retirement separately before exploring career self-concept and retirees who volunteer.

**Retirement.** Retirement was both mentioned and described by the participants in Phase 1 and the participants in Phase 2. Overall, the Phase 1 participants talked about the freedom retirement provided. They spoke about having choice with the activities, including the volunteer activities which they chose to pursue. Interestingly, several participants expressed sentiments that they did not want to have a traditional retirement, and by this they implied that they did not want to have a retirement like their parents’ retirement, one that was removed from the public sphere or a quiet retirement, where travel and golf were the main activities. They all desired engagement in the community through an active retirement, where they were volunteering with one or more nonprofit organizations.

Similar to Phase 1 participants, the Phase 2 participants embraced the retirement role and the freedom and time it brought them to pursue volunteer activities. Comments from the Phase 1 participants indicated that many of them did not view the term and the concept of retirement as amenable to an active and engaged later life. Some of the Phase 2 participants described how they regarded retirement apprehensively prior to transitioning into this new phase of life, but they quickly designed their own retirement and found new stability in their volunteer pursuits. Some described being happier when compared to the year before they retired. Some Phase 2 participants also did not like the term retirement:

I intend to work and volunteer ‘til I drop”; I find the concept of retirement repugnant. I am disgusted by the entitlement and withdrawal syndrome that many of my “public servant/teacher” friends adopt. (Phase 2, Male, Age 57)

The concept of “retirement” is a management term to deal with new people coming into the labour force and others leaving. It is a heritage of the era when
the great unwashed were employed by their betters, managed by them, and retired
by them when the time came. As people’s health, education and personal wealth
have grown, so has their ability to direct their own lives. I think the concept of
“retirement” will become a relic of the industrial age. I believe in the movement
in the US to “half-time”—or arranging one’s financial life so that we can “retire”
from someone else’s job in order to volunteer for free or for little money until the
day we die—barring a debilitating illness near the end of life. The concept of
“retirement” in the survey may be most useful in mapping people’s reactions to
the transition in society as a whole. (Phase 2, Female, Age 65)

With life expectancy increases and a higher proportion of older adults in our society,
current and future older adults will be increasingly seeking to be productive and active; no doubt
some will reject retirement like the participants do above. The results from both phases indicated
that the participants wanted to be active and engaged citizens in their communities. Traditional
views of retirement do not fit. They have found new pursuits and have entered the stage of
Redirection.

Approximately 28% of Phase 2 participants were working part-time, semi-retired,
gradually retired, or retired and working in new positions. In fact, some participants in both
phases took on other forms of work, new pursuits such as self employment. Some participants in
each phase wanted to work part-time indefinitely because they believed working is best for
keeping their mental faculties intact. The rejection of the term retirement came from participants
in both phases, as they embraced Redirection.

Retirees will increasingly design a lifestyle that includes combinations of activities: paid
work and unpaid work, pursuits within their comfort zone and those outside their zone, using
their strengths, their skills and knowledge and seeking to learn something new. Retirement needs
to be designed through Redirection, which can better meet the needs of the current generation of older adults.

The participants preferred an active retirement: the Phase 1 participants were deliberately seeking an active, engaged retirement, and the Phase 2 participants stated that being active and engaged most contributed to their choice of volunteer activities. Some Phase 2 participants spoke of this:

I intend to stay active in all areas in which I am now involved as long as I can….
(Female, Age 62)

We want to be actively engaged with worthwhile projects and seen as contributors. (Female, Age 57)

My plan was to do consulting work after retirement, which I did for three years. I fully retired when it became apparent that my part-time consulting was demanding my mental attention full-time, thus negating my reason for retiring. I needed to be physically and mentally active and became involved in volunteering.
(Male, Age 66)

This desire to be active appears to be a change from the ‘traditional’ retirement of their parents, as Phase 1 participants discussed and one female Phase 2 participant said:

Retirees arrive with many skills and knowledge that they can share, I believe it is important to tap into that knowledge and allow them some opportunity to apply it. We're not the volunteers of old who are content to serve coffee and tea and go home and make dinner!! We want to be actively engaged with worthwhile projects and seen as contributors. (Age 57)

Traditional retirement could be viewed as more quiet, removed from the public domain of work, and focused on leisure activities, travel, family and friends. Some of the Phase 1
participants mentioned that their mom or dad did volunteer in the community, often with the church or rotary club. Some of the Phase 1 participants seemed to rebel against a quiet retirement. The participants have many options for volunteering in the community and for retirement in general with lots of activities, things to do and become involved in. The participants in Phase 1 reported that there were many nonprofits where they could volunteer, and they had to choose their activities. There are a large number of nonprofits today and they have an increasing need to provide service. The nonprofit sector has developed and grown so that there is a proliferation of nonprofit organizations for older volunteers to choose from and the demand for volunteers is great.

Older people differ regarding how much they value being active and in their preference for various past times (Chappell et al., 2003); this varies with their life experiences, personality and economic and social resources. Nevertheless, the Phase 1 and Phase 2 participants were, together, a group of highly altruistic, pro-social individuals who had high levels of career self-concept and desired to be active, contributing members of society. Furthermore, this study included older adults from the baby boomer, the World War II, and the depression era generations. Interestingly, it was not just the baby boomer participants who stated they desired an active and engaged retirement; all generations in this study were striving to be active retirees. In fact, it appears that those who were in their 60s and early 70s in this study exemplify and have created this view of the new senior, and this image of successful aging continues with the baby boomers, despite the fact that boomers have garnered the most public attention as they age (Corporation for National and Community Service, 2007; Cook & Gelfusa, 2009; Denison, 2007; Eisner, Grimm, Maynard & Washburn, 2009; Harvard School of Public Health, 2004; Zedlewski & Schaner, 2006).
With our aging population, it is important for older adults to maintain career self-concept when they can expect 25 to 30 years of retirement. These participants feel it is important to be active and engaged, productive and contributing during this time of their lives and this has compelled them to strive for Redirection. Redirection needs to be considered by career counsellors, life coaches, retirement planning consultants, financial planners, policy planners and other professionals who have an interest in this new perspective on retirement.

**The Self and the Career Self-Concept.** In Phase 1, life themes emerged during the interviews or the reading of the transcripts. These life themes, from the life course perspective, were similar to Super et al.’s concept of life histories. Through these life themes the uniqueness of each Phase 1 participant became clear. These life themes provided a sense of meaning, fulfillment and life purpose for each of the 12 participants. This did not occur in Phase 2 because of the lack of opportunity to dialogue and discuss participants’ histories; however, in stage 2, some aspects of the participants’ life themes were described such as their abilities, knowledge and their description of their self as ‘I’.

Retirement is a process that involves an end to the ‘work self’ (Moen, 1996). Career self-concept can change and evolve, and the results of this study indicate that a career self-concept transition took place among these participants who have retired from paid work and who volunteer. This process can be complex and chaotic, and it involves the disengagement of the worker role and the search for the new self with new roles, all of which leads to a reintegration of the old with the new in the next stage called Redirection. For many people, time and distance are required to process this transition and to determine what comes next. This process can be long and psychologically painful; two Phase 1 participants took a year to go through this process and
one Phase 2 participant said it took a year and a half. Another Phase 2 participant said it took a few years.

An unexpected finding in this study was the recognition that the career self concept grows and changes over time, not just among teenagers and youth, and adults who change their careers, but among mature adults as well. As the experiences of the participants in this study indicate, career self-concept development within Redirection is equally important for older people. How career self-concept develops and changes in older adults is something that should be investigated with future research.

**Life Roles and Self-Concept: Retirees as Volunteers.** Super et al. (1996) discuss interconnection of roles, and in this study the intersection of worker, retiree and volunteer roles and the experiences of the retirees who volunteer is the essence of this study. Almost all of the Phase 1 participants were in their comfort zone, using their strengths, being active, giving back to their community, and feeling fulfilled. In Phase 1, Participant 4 stated: “Retirement gives you enough time where you’ve mastered yourself and interpreted what you are good at, so you can work with your strengths” (Male, Age 55). Participants’ knowledge and skills are both important in this study; both showed the transference from the work role to the volunteer role. The participants provided rich descriptions of these processes.

The participants saw themselves as volunteers, and their volunteering has a big impact on their sense of self and their self esteem. Few participants described themselves as seniors, or as old. They did say that volunteering provides a sense of fulfillment and connection to their community.

Unlike younger volunteers, retirees already have skills, abilities and knowledge. They are desirable because they have much to offer nonprofit organizations through a volunteer role. Their
underlying motivations are different; they don't want to gain skills, network for career advancement, or improve their resume. They are volunteering for entirely different reasons. As a group, they are a mature volunteer work force, but they are still open to learning and new experiences.

Throughout the data, there was interplay between volunteer work and paid work; two examples of this were evident in the survey results. Paid work skills and knowledge are transferred to volunteering and vice versa:

I like to come up with either a summary or see where a solution might come out of the discussion…[I] let them take [my proposed solution], then improve on that. In a sense it seems like I’ve come up with an original idea but often it’s just being able to do a lot of listening and put things together…I have the fundamentals of understanding all these issues that are talked about…But I really try to listen to what the discussion is when I’m chairing it…if I have an idea of how to move it to another stage I’ll do that. The ideas come to me. But I know they are not unique to me because I hadn’t thought about them at the beginning, I only thought about them as I saw them as I saw their discussion and it formed inside me somehow. It is problem solving. I hope it is a talent that I have. Problem solving was part of my previous job. It also comes also from previous volunteer work. (Phase 1, Participant 11)

Volunteering has its own trajectory or career and the phases of volunteering across the life course are described by these Phase 2 participants:

While I have volunteered most of my adult life, it did shift from those things associated with and for my kids e.g. sports coaching, school board, etc., and after they grew I pursued my real volunteering passions of content and impact and interspersed with some ‘obligatory’ volunteering through my corporate role e.g. Art gallery Board, Municipal Committees etc. (Phase 2, Male, Age 58)
What I am volunteering for now is quite different than a year ago and than a year to come... (Phase 2, Female, Age 60)

I have always volunteered in all the communities that we moved to; helping with the Red Cross, St John ambulance, Girl Guides, church involvement. It made living in the communities a richer experience, whilst enabling one to get to know people. (Phase 2, Female, Age 66)

During the stage of Redirection, as the worker role diminishes, the roles of retiree and volunteer interact. The participants received a lot from the interconnection between the retiree and volunteer roles, as these roles seemed to complement each other at a critical time of life. This interconnection process assists older adults with redefinition and reintegration of the self, and this combination of roles boosts self-esteem. Some of the participants’ comments provide insights into this:

I would like to stress the importance of volunteering not only as a source of continuing self-worth and satisfaction but also as a form of continuing education. (Phase 2, Female, Age 66)

Why do you volunteer? The answer from many of us will be: “A need to be needed”. (Phase 2, Male, Age 74)

I don’t know about other people but I find volunteering to be rewarding. Also, it keeps me from sitting at home growing old doing nothing. (Phase 2, Female, Age 72)

Volunteering is vital to a functioning and civilized society and anything that improves the quality or meaning of such work, is undoubtedly valuable. (Phase 2, male, 74)

Volunteering is a great opportunity for retirees to gain life satisfaction of helping others and making our society a better place to live in. It gives one immense self satisfaction. (Phase 2, male, 67)
I feel that my volunteer activities, which I started with immediately upon retiring, along with all my physical activity, have totally helped me feel fulfilled, happy, and satisfied in my retirement years. I heartily recommend this approach and involvement to others. (Phase 2, male, 72)

The participant quotes demonstrate that these volunteers get personal satisfaction and fulfillment out of volunteering and feel that they are contributing to society. Throughout the stage of Redirection, there is truly something special about volunteer work, particularly during this time in their lives. They get a lot out of it, over and above the cognitive, physical and social health benefits. Those who have embraced the volunteer role during retirement wish others would see the same benefits:

I would hope some of the results you obtain would be to help stress the need for volunteers in so many areas. When I think about my neighbours, I am so disappointed that so many of them are not involved and could be. They are missing out and those who would benefit from their expertise are also missing a great deal. (Phase 2, Female, Age 68)

Learning. Learning through volunteering is an important theme in this study and little research previously addresses this. The student role is part of Super’s theory, and lifelong learning through leisure activities is critical for on-going cognitive stimulation and may in fact be protective for mental functioning (Fried et al., 2004; Karp et al., 2006; Verghese et al., 2003).

Learning through volunteering is different from the formal learning that youth engage in at school. The participants in this study already had well developed skills, abilities and knowledge. But they still wanted learning opportunities and had volunteer-related learning goals.

In Phase 1, participants’ opportunities for learning were examined. This provided some excellent examples of learning; however, inquiring about opportunities may have made the participants think of formal learning and be unsure about or dismissive of incidental learning.
Schugurensky, 2000), so learning goals were the focus of the Phase 2 survey. This elicited many examples of self-directed learning and some examples of incidental learning. The majority of participants had learning goals, although some did not express any goals; these participants may not be volunteering out of a desire to learn new things. The finding that many participants do have learning goals matches the purpose of Redirection, which is to provide renewal for older adults, and learning offers this opportunity, enabling them to find fulfillment in new pursuits.

Policy Implications

Super et al. (1996) and their colleagues (Osborne et al., 1997) advocate using theory and empirical evidence to guide practical applications that can assist individuals. This research can be useful to volunteer managers and nonprofit organizations wanting to recruit, place, and retain retirees. Phase 1 indicated that life themes were evident in retirees’ lives and these themes resonated with their paid work and their volunteer activities. This indicates that life themes can be used to assist retirees with finding a volunteer position that is a good match for their skills and aspirations. Just as Super et al. (1996) and colleagues (Osborne et al., 1997) suggest that career counsellors use autobiography and genograms in addition to role salience, values, vocational identity and occupational self-concept assessments to assist young people, volunteer managers can assess retirees’ career self-concept and discuss their life themes or life history and genograms. It is hoped that the career self-concept index used in this study will become a useful and easy to self-administer measure, once it has been studied further, and it can assist with volunteer placements by taking less time than a life history.

The results of this study suggest that career development theory should include the new stage of Redirection, and this may influence policy and guide career development counsellors and human resources managers. Retirees’ commitment to lifelong learning and the new stage of
Redirection might be considered by volunteer managers for recruitment purposes. The stage of Redirection could assist with analyzing older adults’ career trajectory and in guiding volunteer managers and career development counsellors who are working with people facing the transition into retirement. For example, it might be useful to assess older adults’ skills, knowledge and employment history in order to determine if there is an overall life theme that has meaning to them, because continuity with their life theme may provide a more rewarding volunteer experience. It also might be important to assess their level of career self-concept to determine how much continuity they will require. In addition, older adults might be interested in learning about Redirection.

The life-span, life-space theory of career development (Super et al., 1996) needs to be adapted to reflect the reality of an extended period beyond the end of full-time paid careers when retirees redirect their lives into volunteer activities, at times mixed with part-time paid work. Recognizing the meaning of Redirection should be helpful to volunteer managers and nonprofits in guiding retirees into the most appropriate volunteer work and understanding those who desire more challenging volunteer activities, such as the respondent who said “My volunteer work does not challenge me intellectually” (Phase 2, Female, Age 60). This is important because recent research indicates there is a long-term cognitive and mental health benefit from volunteering (Fried et al., 2004; Karp et al., 2006; Kim & Pai, 2010; Verghese, 2003); therefore, it makes sense that retirees be offered stimulating volunteer activities and that they not become an underutilized resource.

Volunteer managers and nonprofit organizations, while trying to match older volunteers to positions, must recognize that sometimes a retiree’s skill strengths do not match their preferences. Retirees may choose to do something completely different not only as a learning
experience but also because it has been a desire for some time and now they have the freedom to pursue it. According to Super et al. (1996), the fit between the traits of the individual and those required in the worker role predict adjustment outcomes of workers to their occupation and the work environment, and this is likely the case for the volunteer role as well. Creating a good fit is important for volunteer management and for nonprofit organizations that want to best place and retain these older volunteers. Without a good fit, older volunteers who are not satisfied with their choices for Redirection will likely revisit their choices and pursue other avenues to meet their needs.

Since the results of this study indicate that aspects of career are transferred into volunteer activities and the phases of volunteering across life can be viewed as career-like, it follows that older adults who are altruistic, and are moderate to high on career self-concept, will have second, and even additional ‘careers’ in volunteering. Volunteer managers, nonprofits and government can ensure older adults are engaged and supported through this. There may be processes and procedures that volunteer managers can create to enable this. There may already be best practices that are being used by other organizations and these may be reflected in older adults’ tendency to volunteer in certain areas (Phillips, Little & Goodine, 2002; Scott, 2005). Therefore, there are three questions that merit investigation are: first, are there characteristics of certain nonprofit organizations that make it more likely or easier for older adults to become engaged and remain engaged in volunteer activity? Second, what do volunteer-friendly organizations for retirees look like and how do they support their volunteers? Third, are they providing opportunities for Redirection?

**Social Policy.** This study has future implications for our aging society. The study participants were striving to be active and engaged in learning opportunities for retirees that take
into account their volunteer-related goals and preferences, thus enabling them to feel fulfilled and remain engaged in society. This research has implications for public policy on volunteering. It also has implications for adult learning and development among middle aged and older adults.

As more research finds that cognitive stimulation from activities such as volunteering provides benefits for the aging brain, all levels of society including nonprofit organizations and government need to consider encouraging older adults to participate (Fried et al., 2004; Karp et al., 2006; Verghese et al., 2003). It is especially important for those who might not normally pursue these or other interests in order to provide them with protection against cognitive decline and disease. In particular, more needs to be done to improve the health outcomes of lower income and lower educated groups and to promote the advantages of volunteering.

With almost 10 million baby boomers in Canada (Statistics Canada, 2007a) it is no surprise that both businesses and nonprofit organization are eager for this generation to be productive during their later years. Researchers, nonprofits, business leaders, government and social policy makers are all interested in this group because their participation or lack of participation in the labour force and the volunteer work force will have significant impact on society. In addition, researchers and policy makers state that as this large generation ages, it will require more services. However, boomers will not act as a group and leave the workforce at the same moment; they are individuals with human agency, making choices that best meet their needs (Chen, 2006; Elder & Johnson, 2003; Marshall, 2005). Furthermore, they will not stop formally and informally volunteering simultaneously with development of chronic health conditions (Dosman et al., 2006; Moen, 1996). Their participation is much more nuanced, as the life course perspective indicates. The concepts of linked lives, with socio-historical influences, and the principle of time and place indicate that social policy and programs can encourage or
inhibit baby boomers’ participation, both in the workplace and in volunteerism. The baby boom generation, by their sheer numbers, have just as often shaped social institutions as they have been shaped by their historical time and place (Stone, 2006). However, certain jurisdictions have repealed mandatory retirement legislation to encourage older adults to remain in the labour force with a view towards the baby boomers on the cusp of retirement, and now it may be time to consider implementing policy and programs, including tax incentives, that promote volunteering.

There is the risk of debasing the meaning of volunteering and minimizing its value, and hindering the good work that comes from nonprofit organizations and their volunteers. As one participant stated: “Volunteering should not be viewed as make-work projects set aside for old people to do” (Phase 2, Male, Age 62). There is too much genuine need at the community level and too many willing volunteers who would be rebuffed and whose efforts would be trivialized by taking this route. As this study has demonstrated, these older volunteers have a wealth of skills and knowledge to offer society, and they deserve respect.

Limitations

There are several limitations with this study and the results must be interpreted with caution. Randomized sampling was not used in the Phase 1 case study or the Phase 2 survey. The sampling strategy in both phases was purposeful and individuals who were willing to participate self-selected to be part of the study. Self-selection creates the risk that only those motivated to take part participated in this study, and this can lead to a biased sample of individuals with strong opinions on the topic. Phase 1 used snowball sampling and this may have contributed to the Caucasian and predominately middle class sample. In Phase 2, a limited percentage of racial and ethno-cultural groups were represented and, because of this, the results cannot be generalized to the general population which is more diverse. In addition, the sampling target in Phase 2 was the
nonprofit organizations across the country since a sampling frame of retired volunteers was not available. This means, however, that the sample was not representative of retirees who volunteer in Canada. Instead, the results reflect the experiences of retirees who volunteer with nonprofit organizations. In addition, the selection criteria of being 55 to 75 years of age, retired within the last 10 years, and volunteering at least 3 hours per week led to a sample that cannot be generalized to the whole population of older volunteers.

Although this survey was sent out to a Canada-wide sampling frame of nonprofit organizations, it was expected that Quebec nonprofits would not be reached due to limitations in funding and time for translating the survey into French. Nevertheless, 5 Quebec participants completed the survey. The Quebec proportion of participants was only 2% for the Phase 2 survey, whereas Quebec represented 19% of participants who filled out the CSGVP. The nonprofit and cooperative sectors have a long history in Quebec and are well integrated into society (Quarter, Mook & Armstrong, 2009; Quarter, Mook & Richmond, 2003); however, while the Quebec participants may be a unique sample, there are not sufficient numbers to investigate this. Therefore, the survey findings must be interpreted with caution due to the lack of participation from the province of Quebec and the voluntary sampling frame that is not representative of the rest of Canada.

Another limitation to this study is the construct validity of the career self-concept scale, openness to learning and health measures. These three measures were adapted from the literature or from research on other age groups and developed specifically for this study. Because the career self-concept scale was the focus of research questions 5 and 6, a lot of development went into it. However, career self-concept is an abstract concept and no other measurement was found that could be used to verify this scale. Super et al. (1996) used a life role salience measurement
for a different concept that was geared for younger people. Although the career self-concept measures in this study were based on the literature, and the findings from the pilot showed an increase in Cronbach’s alpha, the measures were not subject to extensive validation. The career self-concept scale and the openness to learning and health and well-being measures showed Cronbach’s alphas of .76, .75, and .88, respectively; however, these scales require further development and testing. Further to this, the complexities of studying the career self-concept with its close relationship to overall selfhood, identity and self-esteem and the fact that it changes over time makes it difficult to examine in empirical research.

In addition, the coding of transcripts and survey responses was carried out solely by me, and the reliability of the coding was not tested. Finally, although both paper and on-line survey options were provided, the long Phase 2 survey may have limited the response.

In this study, other contextual factors could have been selected such as the desire to maintain a schedule and routine or the desire for social interaction within the public sphere. These may be factors that become more important for older adults during retirement, and they were not investigated.

Finally, some aspects of data collection present a limitation. Participants had to recall their career self-concept and details about their transition into retirement and their paid work career or occupation. Time can affect recollection, even though no participants said that they had difficulty remembering these details. Self-report measures on the survey present another limitation as this type of data is susceptible not only to vagaries of participant memory but also to rationalization and social desirability bias (Creswell, 2003). However, the cost and time required make it unrealistic to follow respondents longitudinally and to examine change from pre to post retirement on such measures as career self-concept, openness to learning and well-being.
In spite of these limitations, this study contributes advances in understanding the significance of volunteer role for retirees and the evolution of their career self-concept.

**Future Research**

Like most exploratory research, this study has generated more questions that need to be addressed. Future research needs to longitudinally examine the evolution of volunteer experience over time and how it relates to previous paid work. There is a rich source of research at the interface between paid and unpaid work and lifelong learning. Retirees should also be followed longitudinally to better understand the process of whether to volunteer, of deciding where to volunteer, of finding a good match for their skills and learning goals, and how they determine how best to contribute to their community, in order to give back to it. This is the process these participants went through as they designed their volunteer lifestyle for retirement.

This study has argued that a new stage, Redirection, should be added to the life-span, life-space approach. Research should be undertaken with other samples of retirees to determine whether there is support for this additional stage. Do retirees who cannot find challenging volunteer work become an underutilized resource? How much intellectual stimulation is important for long-term mental health? If they are underutilized, will they gain the full potential benefits of volunteering? Is there a critical time for using skills and knowledge in order to maintain them, and how are nonprofit organizations viewing this?

Individuals in professional jobs tend to volunteer more often than those in other occupations (Choi, 2003; Tang, 2008; Webb & Abzug, 2008), and as mentioned previously, this was the case in this study as well. The reasons for this finding are uncertain; therefore, this finding creates additional questions about whether it is due to a lack of time, perceptions about a lack of skills to offer, financial insecurities, or perhaps little to no interest in volunteering and a
difference in values and attitudes. Do individuals from certain occupations have fewer
optunities (Chen, 2005) to pursue volunteering? Is the lower participation in volunteering
among retirees formally in manual labour and the trades perhaps due to their involvement in
informal volunteering? Is the difference because they are less well-connected to nonprofit
organizations, and are not being asked? Because the social economy field is so large, they
probably have exposure to some nonprofit organizations. However, if research continues to
connect volunteering to improved mental and physical health, then there is a societal imperative
for health promotion reasons to actively encourage volunteering. Here, income tax-related
incentives similar to those provided to encourage children to be physically active might be a
possibility. It is uncertain whether older adults, and those retired from the trades and manual
labour in particular, would participate in volunteer activities if there were income tax credits, but
this policy could be researched.

Future research should examine the use of management skills and leadership and
governance skills in volunteer activities. Approximately half of the participants in this study
brought these skills from paid work and could have used them in their volunteer activities. This
study indicates that management skills are not being transferred as often as other skill sets are. If
this is the case, are older volunteers more likely to sit on boards of governance? Are older
volunteers involved in managing people or programs at nonprofit organizations? Are older
volunteers using their higher level skills such as decision making, problem solving and
leadership? Are their wealth of management, leadership and governance skills being well
utilized? Are there opportunities for older volunteers to provide mentorship or training? These
are questions that future research could address.
Older adults continue to age, and older volunteers need to be followed longitudinally to see how the process of aging impacts their volunteer activities and how nonprofits begin to accommodate them and adapt as the older volunteers’ needs change. Is there another stage beyond Redirection?

As the Canadian population ages, there will be additional older role models and society will value and respect older people more. The participants in this study did describe some examples of ageism. There needs to be additional research on ageism and how this is affecting older adults’ roles in society, including the volunteer role.

The participants in this study were interested in lifelong learning and wanted to be mentally active. They had a wide range of multi-dimensional learning goals for their volunteer activities. This begs the question: Do younger age groups have multi-dimensional learning goals for volunteering activities as well? How do they compare? Or do young people favour cognitive or physical-based (hands-on) learning goals in volunteering?

A number of participants in both phases rejected the term ‘retirement’ and wanted it changed. Their aspirations reflected the need for a new stage, Redirection, for older adults in our society, one that better matched their experiences. Future research should examine these individuals who are actively rejecting retirement in more depth to learn more about them and their experiences in the stage of Redirection.

The participants in this study were striving to be active and engaged, and were interested in lifelong learning. Older adults are a growing demographic not only in Canada but also around the world. Is the increased interest in volunteering during retirement, this stage of Redirection, unique to Canada or are other countries experiencing it as well?
The research in this study was exploratory and other studies need to be carried out to see if the results of this study can be replicated. Finally, the career self-concept index requires further testing to assess its usefulness to volunteer managers, career counsellors, life coaches, retirement planning consultants and financial planners.

Conclusion

Volunteering with nonprofit organizations represents a career transition for retirees who are using their previous paid work skills, abilities and knowledge in their volunteer activities to provide services to similar populations and clients as they did previously. For this group of retirees, their worker and volunteer roles intersect.

The participants in this study were striving to be active and engaged in their community. They were interested in lifelong learning and had learning goals for their volunteer activities. Through volunteering and transferring aspects of their previous career to their volunteer activities, they have maintained aspects of their career self-concept, but other elements of career self-concept have been transformed as they went through a development process. As a result, I suggest that Super et al.’s (1996) life-span, life-space theory of career development should be augmented to reflect the experiences of these retirees and a new stage called ‘Redirection’ should be added. The tasks of Redirection are: redefinition, renewal and integration.

Redirection may be viewed by older adults as an attractive alternative to retirement. With so many people on the cusp of their traditional retirement years, and increases in life expectancy, more individuals will be able to enjoy as much as three decades of ‘retirement’, and Redirection will become increasingly important in our society.


References


Appendix A: Consent Form

On OISE letterhead

Date

Hello,

My name is Suzanne Cook and I am a Ph.D. student in Adult Education and Community Development, and the Collaborative Program on Aging and the Life Course, at the University of Toronto. I want to ask you some questions about what it is like to be a retired volunteer. My research study is entitled Using Career Development Theory to Interpret the Activities of Retired Volunteers.

I am looking for adults aged 55 and over who have recently retired, and are volunteering at least 3 hours per week to help others. I plan to speak with 10 people who are willing to provide insights into their volunteer and pre-retirement experiences. I may be interested in looking at memorabilia, such as photos, thank you cards, certificates of appreciation, plaques, etc. that you have from your work and volunteer activities, if you are willing to share these items with me.

Interviews will be audio-taped. The information that I collect will be kept confidential. No identifying names will be used (unless you request otherwise). Transcripts of all interviews will be kept in a locked filing cabinet. The audio-tapes will be kept until one year after publication of this study. The transcripts will be destroyed in 2013, once a further longitudinal study on this topic is conducted. I plan to share my research with other people in the non-profit and gerontology fields through presentations and publications based on this study.

I do not foresee any harm or risks from participation in this study. However, the benefits are that participants will gain insights into their transition into retirement and the transfer of their skills and abilities from their careers to their volunteer activities. By better understanding individuals’ volunteer and retirement experiences, I hope to help non-profit organizations enhance their recruitment and retention programs.

I invite you to take part in an interview on your pre-retirement career and your volunteer experiences. This interview may take the form of up 3 meetings lasting one hour each. These interviews will be used to design a survey and you will be contacted for feedback on the survey questions. Your participation is voluntary. You can withdraw from the study at any time. You do not have to answer any question you do not want to. There will be no compensation offered for your time. If you would like to receive a summary of the research findings, please include your email address on the form below.

At any time, you can feel free to contact the University of Toronto Ethics Review Office at ethics.review@utoronto.ca or (416) 946-3273 if you have any questions about your rights as a
participant. My thesis supervisor’s name is Dr. Jack Quarter. You can contact him at (416) 978-0820 or by email at jquarter@oise.utoronto.ca.

If you have any questions, please feel free to contact me any time at scook@oise.utoronto.ca. Thank you very much for your time and your assistance with this study.

Sincerely,

Suzanne Cook
Ph.D. Student
OISE/UT, Adult Education and Community Development
scook@oise.utoronto.ca
OISE/UT, 252 Bloor St. W. Toronto, ON M5S 1V6

I have read the letter provided to me by Suzanne Cook and agree to participate in an interview for the purposes described.
Signature:

Name (printed):

Date:

Email:
Appendix B: On-line Survey Information Letter

Hello,

My name is Suzanne Cook. I am a Ph.D. student at the Ontario Institute for Studies Education of the University of Toronto. I am doing a study on retirees who volunteer with non-profit organizations and I am interested in locating retirees who would be willing to complete a survey that examines their volunteer activities and their pre-retirement paid work.

I hope to have more than 200 respondents from across Canada. The respondents must be 55 to 75 years of age (inclusive). They must have retired within the last 10 years and volunteer approximately 3 hours per week.

I will be conducting the survey from November 1st to January 9th, 2009. The survey will take 20 to 30 minutes to complete. Participation is voluntary and the information collected will be kept strictly confidential. Additional copies of the survey can be requested by contacting me directly at the address below.

If you forward this email to others who might be interested in filling out my survey, please ensure they have the following general link:


If you have any trouble accessing the survey, please do not hesitate to contact me. Thank you for your interest in and support of my research.

Sincerely,

Suzanne Cook, Ph.D. Candidate
Adult Education & Community Development
Ontario Institute for Studies in Education
University of Toronto
7th Floor, 252 Bloor Street West
Toronto, ON
scook@oise.utoronto.ca
Appendix C: Survey Letter of Consent

Hello,

My name is Suzanne Cook. I am a Ph.D. student at the Ontario Institute for Studies Education of the University of Toronto. I am doing a study on retirees who volunteer with non-profit organizations and I am interested in finding retirees who would be willing to complete a survey that examines their volunteer activities and their pre-retirement paid work.

First, let me explain a bit about myself and my research. I am in the third year of my program at the University of Toronto. I have been interested in retirees for some time. My undergraduate thesis was on retirement and I taught Gerontology courses at the University of Guelph for 3 years before beginning my Ph.D. program. For the past several years, I have been interested in retirees who volunteer in their communities. It is my hope that this research will assist non-profit organizations with the recruitment, placement and retention of older volunteers and be insightful for the volunteers themselves.

I hope to have 200 respondents from across Canada. The respondents must be 55 to 75 years of age (inclusive). They must have retired within the last 10 years and volunteer approximately 3 hours per week.

I will be conducting the survey during November and December, 2008. The survey will take 20 to 30 minutes to complete. Participation is voluntary and the information collected will be kept strictly confidential. Additional copies of the survey can be requested by contacting me directly at the address below. I will be accepting completed surveys until January 9th, 2009. An on-line version of the survey is also available.

I plan to share my research with other academics and researchers through presentations and publications based on this study. Written reports will not identify respondents or their organizations. Only I will have access to the data. I plan to keep the data from this study until 2013 when a further study is conducted on this topic. If you are interested in hearing more about my research, please feel free to contact me by phone at 416-201-1619 or by email at scook@oise.utoronto.ca. At any time, if you have questions about your rights as a survey respondent, you can contact my thesis advisor Dr. Jack Quarter at 416-978-0820 and by email at jquarter@oise.utoronto.ca or the Office of Research Ethics at 416-946-3273 or by email at ethics.review@utoronto.ca.

Please let other non-profit organizations and retirees know about my survey and feel free to provide my contact information to anyone you think might be interested in my survey. Thank you for assisting me with my research. I appreciate your time and interest in my study.

Sincerely,
Suzanne Cook, Ph.D. Candidate
Adult Education & Community Development
Ontario Institute for Studies in Education
7th Floor, 252 Bloor Street West
University of Toronto
Toronto, ON M5S 1V6
scook@oise.utoronto.ca
Appendix D: Interview Protocol

Imagine you are meeting someone for the first time and you want to introduce yourself to them. How would you describe yourself? (Who are you?)

Can you describe your transition into retirement?

Tell me about your pre-retirement career. (position/title, responsibilities, job tasks, specialized knowledge).

How many hours per week did you generally work?

What skills, abilities and knowledge did you use in your occupation?

Did you enjoy your job? (Explain).

How fulfilling was your work?

Did you identify yourself as being a __________________(pre-retirement career)? How much of your identity was related to being a __________________?

How would you describe yourself now based on roles in your life today?

Can you tell me about the aspects of yourself that are important to your identity?

How do you see yourself and how do others see you?

What do you value most in life? (your sense of your priorities).

Did you volunteer at all while you were in the workforce?

Did your parents volunteer? Did or does your spouse volunteer?

Tell me about the first time you volunteered with ____________________ (volunteer agency name or type).

What first made you want to volunteer? (What was your goal in getting involved in volunteering?)

Can you tell me more about the kinds of things you did at __________________? (volunteer agency)

How many hours per week on average do you volunteer?

Do you think your skills, abilities and knowledge from your occupation were transferred to the volunteer activities you do at ____________________? (volunteer agency)
Interview Protocol Page 2

If you had to quantify this, what proportion of your skills and abilities are being used in your volunteer work?

Do you feel (or don’t feel) that your skills and abilities are well utilized in your volunteer activities? Explain.

Do you see yourself limited in any way with regard to what you do at ____________? Please explain.

Tell me about any opportunities for learning and personal development that have arisen through your volunteer activities.

Do you see any changes in your self-concept during your transition from the paid workforce into retirement and your volunteer activities? Explain.

In your opinion, is volunteering as you enter retirement a form of career transition for you? Explain.

Was your goal in volunteering to use your ____________ from your paid work into your volunteer activities?
Appendix E: Phase 2 Survey Instrument

There are various pathways into retirement and all of these pathways are valid. Please answer the following questions to help me better understand your retirement.

1. Which of the following best describes your retirement status?
   □ Fully retired (I am no longer in the paid work force)
   □ Semi-retired (I previously worked full-time and now work part-time or less than 30 hours per week)
     Please explain if this work is the same as your paid work before you considered yourself retired.
     ____________________________________________ ____________________________________________
   □ Gradually retiring (I have been gradually reducing the number of hours I work for pay, and intend to stop work completely at a future date). Please go to Question 3
   □ I retired AND am currently engaged in paid work through, for example, a second career or a new business
   □ Other (Please explain) ________________________________________________________________

   Please go to Question 3

2. In which year did you retire? (If you don’t know, please provide an approximate year.)
   ___ ___ ___ ___ Please go to Question 4

3. Please consider the date you began your gradual or semi-retirement as the date of your retirement for the purposes of this survey. Please write this date below:
   ___ ___ ___ ___

   In addition, please keep this particular date in mind as you consider your responses to all questions that ask about issues during the year before your retirement. If you plan to fully retire from paid work, but have not as of yet, please indicate an approximate year for your full retirement below.
   ___ ___ ___ ___
4. The following question concerns pensions. Which of the following responses applies to you?
   I am receiving:
   □ Canada Pension Plan (CPP)/Quebec Pension Plan (QPP)
   □ Company Pension
   □ CPP/QPP AND a Company Pension
   □ I do not receive a pension
   □ Other (Please explain)
   __________________________________________________________

5. In the year before your retirement, was your paid work mostly
   □ Full-time
   □ Part-time
   □ Self-employed
   □ Other (e.g., contract, seasonal) Please specify __________________________

6. In the year before your retirement, the PRIMARY type of paid work that you were engaged
   in was (Please check one):
   □ Business, finance, administration
   □ Natural and applied sciences, high technology
   □ Health care and health services
   □ Social science
   □ Education and training
   □ Government service and social service
   □ Arts, culture, recreation and sport
   □ Religious service
   □ Sales and Service
   □ Transport
   □ Construction
   □ Utilities
   □ Primary industries (e.g. fishing, agriculture, forestry, mining, horticulture)
   □ Processing and manufacturing (e.g. oil refinery, pulp and paper mill)
   □ Trades, installation, maintenance and equipment operation
   □ Other (Please specify) ____________________________________________________

7. In your paid work before retirement, how often did you...
   In your volunteer activities since retirement, how often do you...
   | Frequently | Sometimes | Never | Frequently | Sometimes | Never |
   | manage others | | | | | |
7. In your paid work *before* retirement, how often did you...

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<thead>
<tr>
<th>Frequency</th>
<th>Sometimes</th>
<th>Never</th>
<th>Frequency</th>
<th>Sometimes</th>
<th>Never</th>
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<tr>
<td>lead others</td>
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<td>educate</td>
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<td>train</td>
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<td>counsel</td>
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<td>mentor</td>
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<td>legislate (e.g. law)</td>
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<td>care and heal</td>
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<td>research or write</td>
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<td>administer</td>
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<td>organize</td>
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<td>present or speak publicly</td>
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<td>sell, advertise or market</td>
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<td>serve or assist</td>
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<tr>
<td>analyze ideas, numbers or data</td>
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<td>create (e.g., artistic work)</td>
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<tr>
<td>operate machinery or transport material</td>
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<tr>
<td>engineer</td>
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</table>
7. In your paid work _before_ retirement, how often did you...

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<th></th>
<th>Frequently</th>
<th>Sometimes</th>
<th>Never</th>
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<tbody>
<tr>
<td>produce or repair (e.g., mechanics)</td>
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<tr>
<td>construct</td>
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<tr>
<td>other (please specify)</td>
<td>_______</td>
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In your volunteer activities _since_ retirement, how often do you...

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<th>Frequently</th>
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<th>Never</th>
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</table>

7. Are there skills or abilities that you gained from previous paid work and would like to use in your volunteer activities but are currently not?

☐ Yes (Please explain)

________________________________________________________

________________________________________________________________________

☐ No

☐ Don't know

8. In the following four questions, I am trying to understand how you see yourself now and in the year before you retired. This is because the 'self' undergoes a transition during this time. Some retirees speak about how their working self is gone. Please provide three (3) statements to each the following:

How would you have answered the question "Who am I?" during the year before you retired?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Who am I now?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

When people ask you "What do you do?", what do you say?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
We are reflected through the eyes of others. How do you think those around you see you today?  
(e.g. former colleagues, neighbours and/or society in general)

___________________________________________________________________________
___________________________________________________________________________

9. Please read each of the following statements. Indicate how much you agree or disagree with each statement using a check mark for your response.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I mostly think of myself as a retiree from my paid work or occupation.</td>
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<tr>
<td>I did NOT enjoy my paid work.</td>
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<tr>
<td>I wanted other people to view me as capable and competent in my paid work.</td>
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<td>I put pressure on myself to be successful at work.</td>
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<tr>
<td>My paid work was fulfilling.</td>
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<tr>
<td>My paid work was only important to me because of the money it provided.</td>
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<tr>
<td>When I was working, I had other roles in life that were MORE important to me than my paid work role was.</td>
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<td>My success in my paid work was important for my self-esteem.</td>
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<tr>
<td>I took pride in my work.</td>
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<tr>
<td>My paid work was the most important thing in my life.</td>
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</tbody>
</table>

10. Please read each of the following statements about your volunteer activities. Indicate how much you agree or disagree with each statement using a check mark for your response.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>When I compare my paid work and my volunteer activities, I</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Statement</td>
<td>Strongly Agree</td>
<td>Agree</td>
<td>Somewhat Agree</td>
<td>Disagree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>help or work with similar clients or groups.</td>
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<tr>
<td>When I compare my paid work and my volunteer activities, they are located in a similar physical environment.</td>
<td></td>
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<tr>
<td>My volunteer activities add to my quality of life.</td>
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<tr>
<td>My volunteer activities contribute to my overall well-being.</td>
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<tr>
<td>My volunteer activities validate my feelings of self-worth.</td>
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<tr>
<td>My volunteer activities made my transition into retirement easier.</td>
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<tr>
<td>I feel that my life has meaning.</td>
<td></td>
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<tr>
<td>I am happy.</td>
<td></td>
<td></td>
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<tr>
<td>I view myself positively.</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

12a. Do your volunteer activities use knowledge that you gained from your paid work?
   - ☐ Yes
   - ☐ No
   - ☐ Don't know

12b. If you answered 'yes' above, what type of knowledge do you use and how do you use it in your volunteer activities?

12c. If you answered 'no' above, can you please further explain why this is the case?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

13. What knowledge, skills, values or attitudes from your paid work are most useful to your volunteer activities?

________________________________________________________________________
________________________________________________________________________
14. The following questions describe learning. Please check the response that best matches you.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like learning new things.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staying mentally active and engaged is <strong>NOT</strong> important to me.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life-long learning is important to me.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am interested in many things.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I seek out opportunities to learn something new.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

15. Please describe any goals you have that are related to learning something new through your volunteer activities.

__________________________________________________________________________

__________________________________________________________________________

16. What was MOST important to you in choosing your volunteer activities?

- ☐ Being active and engaged
- ☐ Using my skills and abilities
- ☐ Using my knowledge
- ☐ Volunteering in a familiar setting
- ☐ Contributing to my community and to society
- ☐ Having social interaction
- ☐ Learning something new
- ☐ Being personally affected by the cause or issue
- ☐ Believing in the cause
- ☐ Other (Please specify)

__________________________________________________________________________

16b. Please further explain your response to the above question

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
17. Did you consciously choose volunteer activities that

☐ were related to your paid work
☐ were somewhat related to your paid work
☐ were not at all related to your paid work
☐ I did not give this much thought

Please further explain

__________________________________________________________________________

__________________________________________________________________________

17b. Would you say your volunteer activities were primarily developed through:

☐ a planned approach to your retirement?
☐ serendipitous opportunities that you have had?

18a. Did someone you know ask you to help out at the non-profit organization where you currently volunteer?

☐ Yes
☐ No
☐ Don’t know

18b. If you indicated “Yes” above, please specify your relationship to the person who asked you to help out.

__________________________________________________________________________

19a. How many organizations in total do you volunteer at?

______________

19b. Approximately how many hours per month do you volunteer, on average?

_____________________

20. For how many years have you been involved in volunteer activities with organizations?

☐ Less than one year
☐ One to two years
☐ Three to four years
☐ Five to nine years
☐ Ten to fourteen years
☐ Fifteen to nineteen years
☐ Twenty to twenty-four years
☐ Twenty-five to thirty years
☐ More than thirty years
21. What sector of society is your volunteer organization(s) in? Check all that apply.

- social service agencies
- school group
- education
- research
- sports and recreation
- religious organization
- professional association or union
- arts and cultural organization
- hobby group
- senior’s group
- youth group or organization
- service club or organization
- advocacy/political group
- conservation or environmental group
- support group or self-help organization
- community group
- other (please specify) ________________________________

22. Is there a mission or a broader purpose for the volunteer work you are doing which resonates strongly with you or moves you? Please explain.

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

23. What types of volunteer activities are you involved with at organizations? (Please check all that apply)

- Direct service e.g., to seniors, persons with disabilities (please specify)

- Advocacy
- Lobbying
- Outreach
- Public relations
- Research
- Training
- Educating
- Mentoring
- Counselling
- Fundraising
- Organizing
- Creating
- Policy
Activity Types Continued
☐ Financial activities, excluding fundraising
☐ Administrative activities, excluding fundraising
☐ Board of Directors appointment
☐ Producing
☐ Construction
☐ Other (Please specify) ___________________________________________________

If possible, please explain further details on your volunteering above
_________________________________________________________________________

24. What most contributes to your choice to CONTINUE volunteering with the non-profit organization where you volunteer the most number of hours?
☐ The opportunity to use skills, abilities and knowledge
☐ The opportunity to meet other volunteers
☐ The opportunity to meet clients and staff
☐ The opportunity to learn new things
☐ Knowing I am doing meaningful work
☐ Other (Please specify)
_________________________________________________________________________

25. What, if anything, would make it EASIER for you to volunteer?
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

29. What is your month and year of birth? (MM/YYYY) ___________/_____________

30. If you were NOT born in Canada, in what year did you come to Canada to live?

31. What is your sex?
☐ Male
☐ Female

32. Are you currently:
☐ Married or living common-law
☐ Widowed
☐ Separated
☐ Divorced
☐ Single AND never been married
33. What is your ethno-cultural identification? 
__________________________________________________

34. What is the HIGHEST grade or year of school you completed?
   □ Some elementary school
   □ Completed Elementary School
   □ Some high school
   □ Graduated from high school
   □ Some community college, trade, technical, or vocational school or business college
   □ Some university
   □ Diploma or certificate from community college, trade, technical or vocational school or business college
   □ Bachelor’s or undergraduate degree
   □ Teaching Certificate (B. Ed.)
   □ Degree in Medicine, Dentistry, Veterinary Medicine or Optometry
   □ Master’s degree
   □ Earned Doctorate

35. Do you live in:
   □ the downtown of large urban city
   □ an urban area of a large city, outside of the downtown core
   □ a suburban city
   □ a small city
   □ a rural town
   □ a rural village
   □ a rural farm/isolated area
   □ other (please specify)
   ____________________________________________________

36. Do you attend religious services/meetings?
   □ Once a week or more
   □ Once a month
   □ Four or five times a year
   □ Two or three times a year
   □ Once a year
   □ Not at all

37. What is your postal code? ______________________________
38. For statistical purposes only, information about your household income, including pensions, would be helpful. Which category best describes the total income of all household members, before taxes, for the last year?

- Under $20,000
- $20,000-$29,000
- $30,000-$39,000
- $40,000-$49,000
- $50,000-$59,000
- $60,000-$74,999
- $75,000-$99,999
- $100,000-$124,999
- $125,000 or more

Is there anything you would like to add or share with me, or anything important that was not covered?

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Thank you for your thoughtful answers to my questions.

I hope to interview some respondents further in order to discuss topics covered by this survey in more detail. If you are interested in speaking with me regarding your experiences, please provide your name, mailing address, email address and telephone number and the best time to reach you in the space below so I can contact you. Thank you.

Name:
Address:
Phone number:
Email:

I plan to conduct a follow-up longitudinal study within the next 5 years. If you wish to be part of this study, please provide your full name, mailing address, email address and telephone number so I can contact you in the future.

If you would like a copy of the results of the survey, please provide your mailing address or email address: ________________________________
Thank you for participating in my survey of retirees who volunteer with non-profit organizations.

The study is for educational and academic purposes. I greatly appreciate your time, interest and support of my study.

Sincerely,
Suzanne Cook
Ph.D. Candidate
OISE/University of Toronto
Toronto, Ontario
suzanne.cook@utoronto.ca
Appendix F: Analyses of the 16-Item Pilot Career Self-Concept Questionnaire

A 16-item questionnaire on career self-concept was designed and piloted with 32 student participants (see Appendix G for a copy of the questionnaire). The questionnaire used a 5-point Likert scale; because of the small number of participants, these data were coded into 1 and 2 = 0, 3 = 1, and 4 and 5 = 2 for analysis. The following 5 items were reverse coded: Have Many Hobbies, Enjoy Work, Having Many Roles, Always Spend Time with Family and Friends, and Family and Friends are Most Important. The computer program ConstructMap (Bear Center, 2009; Wilson, 2005) was used to compute classical item analysis statistics and apply the item response theory partial credit model to scaling these data. The partial credit model was chosen because the data were not dichotomous and not a true scale with equal distances between ratings.

Implications for Item Design and Construct Map Development

Based on the results of the Phase 1 interviews and the literature review, a construct map (Wilson, 2005) was developed (see Appendix H). This construct map outlines increasing levels of career self-concept on the left side and the hypothesized ordering of the items is shown on the right side. The items are arranged along the continuum so that those that were hypothesized to indicate high levels of career self-concept are at the top of the map and those that indicate low levels of career self-concept are at the bottom. This hypothesized construct map can be compared against the analysis results.

Item Development.

All of the background information discussed above went into the development and design of 16 items on career self-concept (see Appendix H). The items tapped characteristics such as identification with paid work, the importance of the work role in life, the enjoyment of work,
recognition of talents and skills, others’ views on the importance of work, pressuring oneself to be successful, finding work fulfilling, the importance of co-workers to the enjoyment of work, being driven and always pursuing new opportunities and learning, and having other hobbies and roles in life apart from paid work.

**The First Partial Credit Model.** The paper and pencil survey consisting of these 16 items was given to 32 respondents. Individuals in the pilot consisted of a convenience sample of graduate students and family members, including 5 retirees.

The item estimates and fit graph are fit indices that examine the weighted mean squares and $t$-statistics for each item. The infit graph demonstrates that all 16 items fit within reasonable bounds – 75 (≈3/4) and 1.33 (≈4/3), which are considered reasonable upper and lower bounds for infit (Wilson, 2005). Thus, the overall finding is these data fits the partial credit model reasonably well.

An examination of the classical item statistics indicates that the outfit (mean square) for a number of items is problematic. This is the case for Learning New Things, Always Seeks New Opportunities, Having Many Hobbies, Enjoying Work, Fulfilling Work, Having Many Roles, Coworkers are Important, Always Spending Time with Family and Friends, and Knowledge. For all of these items, the outfit is equal to 1 and this value should be less than 1. Further, for Knowledge, the $t$-statistic is -13.62, which is low when compared to other measures. This indicates a problem with variability among respondents. The item characteristic curve for the knowledge item further demonstrates that this item is not a good fit with the rest of the model – all the responses to this item were the same, skewing the data. There is much less variability among people than there should be, meaning that this item is not useful for distinguishing among people. The high outfit for some of the items may be due to the nuanced language and wording of these questions.
This model had a Cronbach’s alpha of .60. This reliability measure for internal consistency is quite low, and this model could be improved upon to make it more useful for investigating career self-concept. The Knowledge item was the item with the least variability in scores. The other items discussed above as having higher outfit had better variability and were all well positioned in relation to the construct. A decision was made to eliminate the Knowledge item and rerun this partial credit model to see if the model could be improved.

The test information curve for this model indicates that the most precise information is not located in the middle of the curve. The test information curve demonstrates a linear relationship with little slope.

**The Second Partial Credit Model.** For the second partial credit model, the Knowledge item was dropped, and the model was rerun. The fit graph for this model demonstrates that 14 of the 15 items fit within reasonable bounds. Only the item for Co-workers is higher than the upper bounds; it is at 1.48, indicating higher variability than expected. Thus, the overall finding is that based on infit, these data, apart from the Co-workers item, fit the partial credit model reasonably well.

An examination of the classical item statistics indicates that the outfit (mean square) is problematic because it is higher than 1 for the following items: Knowing Goals, Having Many Hobbies, Having Many Roles, Coworkers, Always Thinking about Work, and Family and Friends Most Important. This indicates a problem with variability among respondents. The item characteristic curves for these items were good except for the following items: Having Many Hobbies, Having Many Roles, Time with Family, and Family and Friends Most Important. This indicates that these items are not a good fit with the rest of the model and all the responses are the same. There is much less variability among people than there should be. One reason for this
may be the wording and nuanced language of these questions. These items were strongly worded (see Appendix G) and this may have confused people. It is recommended that the wording of these items be adjusted and another pilot be run in an effort to remove the lack of respondent variability with these four items.

Removing the item on Knowledge in this model increased Cronbach’s alpha to .61, a negligible change and indicating again that the model could be improved upon. The item Family and Friends being the Most Important Things in Life was an outlier on the construct map, being situated away from the other items. The other items discussed above as having higher outfit were well positioned.

The ordering of the items and their responses for the most part indicate that items hypothesized to have higher levels of career self-concept are situated higher, while lower items are at the bottom of the map. This will be discussed further with the final model, Model 3.

There were some surprising findings related to the placement of the items on the construct map. The response agreeing with Pressure Self to be Successful was slightly higher than the response disagreeing with this statement. While the response agreeing with the item Enjoying Work was higher than not enjoying work, this item was not placed very high on the construct map. The responses agreeing and disagreeing with Having Hobbies were placed close together. The response of agreeing with the item Having Roles Outside of Work was placed higher in relation to the construct than disagreeing with this item. The Family and Friends Most Important item was placed much higher than expected and the response to this item was the opposite of what was anticipated. The expected consistency in responses was not found. Perhaps the nuanced language confused the respondents.
A decision was made to eliminate the Coworkers item and rerun this partial credit model to see if the model could be improved.

**The Third Partial Credit Model.** For the third partial credit model, the Coworkers item was dropped and the model was rerun. The fit graph demonstrates that all 14 of the items fit within reasonable bounds, being between .75 (\(=3/4\)) and 1.33 (\(=4/3\)), which are considered reasonable upper and lower bounds for infit (Wilson, 2005). Thus, these items demonstrate good infit with this partial credit model.

An examination of the classical item statistics indicates that the outfit (mean square) is problematic for the following items: Having Many Hobbies, Having Many Roles, Always Thinking about Work, Always Spending Time the Family, and Family and Friends Most Important. This is because the outfit value is higher than 1 for these items and this indicates a problem with variability among respondents. The item characteristic curves for these items were good except for the following items: Having Many Hobbies, Having Many Roles, Time with Family, and Family and Friends Most Important. This indicates that these items are not a good fit with the rest of the model and all the respondents tend to respond the same way to these items. There is much less variability among people than there should be.

The construct map indicates that most respondents have moderate levels of career self-concept. Most of the respondents are clustered in the middle of the map. In addition, the items are nicely distributed across the scale.

Removing the item on Coworkers in this model increased Cronbach’s alpha to .65 for this model. While this is a small improvement in this reliability measure for internal consistency, this statistic is still pretty low indicating that this model could be improved upon. At 32 respondents, this sample is small, so this reliability statistic should be interpreted cautiously. The item Family
and Friends Are the Most Important was an outlier, being situated away from the other items. The other items discussed above as having higher outfit were well positioned. Again, the same items that were not in the correct order within Model 2 on the Wright map are out of order in Model 3.

A decision was made to eliminate the Having Many Hobby and Having Many Role items and rerun this partial credit model to see if the model could be improved.

**The Fourth Partial Credit Model.** For the fourth partial credit model, the Hobbies and Role items were dropped and the model was rerun. Here, the fit graph demonstrates that all 12 of the items fit within reasonable bounds. One item, Knowing Skills, has infit equal to .75, which is acceptable. Thus, these items conform to this partial credit model very well on infit.

An examination of the classical item statistics indicates that the outfit (mean square) is problematic for the items Knowing Goals, Enjoying Work, Always Thinking about Work, Always Spending Time the Family, and Family and Friends Most Important; the outfit value is higher than 1 for each of these items, indicating that there is little variability among respondents.

The map indicates that most of the items are situated at the top end of the continuum. In fact, only 3 items are situated at the low end. Most of the respondents are at the lower end, with only one respondent nicely within the large the cluster of items.

Removing the Having Many Hobbies and Having Many Roles items for Model 4 increased Cronbach’s alpha to .7; however, this statistic should be interpreted with caution because this is a small sample, containing only 32 respondents. A Cronbach’s alpha of .7 is however an improvement in this reliability measure for internal consistency; nevertheless, this statistic is still low, indicating that this model could be improved upon. Again, the same items that were not in the correct order within Model 2 are out of order in Model 4.
Although Cronbach’s alpha was raised to .7, this could have been due to the sample size more than reliability. The decision to reject this 4th partial credit model was made because of the distribution of items and respondents on the construct map.

**The Fifth Partial Credit Model.** To create a shorter career self-construct instrument, a fifth model was tested. For the fifth partial credit model, the following items were dropped: Knowing Goals, Knowing Skills, Learning, Seeking Opportunities, Spending Time with Family, Thinking about Work, and Family and Friends Important. Only six items were included in the model: Identified with Work, Other People Say Work is Important, Pressure Self, Enjoy Work, Work was Fulfilling and Roles.

The fit graph demonstrates that 5 of the 6 items fit within reasonable bounds. While the majority of items demonstrate good infit with this partial credit model, the item Enjoy Work is out of bounds and this is particularly problematic because the Phase 1 case study indicated that this item may be a critical indicator of career self-concept.

The classical item statistics indicate that the outfit (mean square) for the items Identifying Self with Paid Work, Other People Say Work is Important, Pressure Self, Enjoy Work, and Work was Fulfilling is problematic because this value is higher than 1, indicating that there is little variability among respondents.

The construct map shows that most of the items are situated at the top end of the continuum. Most of the respondents are at the lower end, with only two respondents nicely within the large cluster of items.

Reducing the items to the six items theorized to be most critical to career self-construct in Model 5 decreased Cronbach’s alpha to .56, and while this statistic should be interpreted with
caution because this is a small sample, this is a very poor reliability measure for internal consistency.

**Conclusion**

The process of model development helped in choosing and eliminating items that were a poor fit for the construct of career self-concept. During this process, Cronbach’s alpha, the reliability statistic, increased from .6 to .65.

In conclusion, Model 3 of career self-concept was chosen because of the distribution of respondents and items, when compared to Model 4. In addition, Model 3 was chosen over Model 5 because Enjoyed Work was inbounds on the infit statistics on Model 3, and this model also obtained better reliability when compared with Model 5. While both Models 3 and 4 had good item estimates and classical statistics, both models were not equally good. Although Model 4 had a higher Cronbach’s alpha, its distribution was not as effective, demonstrating very little overlap of items and respondents on the construct map. Model 3 is the preferred model of career self-concept.
Appendix G: Pilot 16-Item Career Self-Concept Construct Map

Increasingly high levels of career self-concept

- Respondents whose self-concept is derived entirely from their paid work.

Moderate amount of self-concept is derived from paid work.

- Small amount of self-concept is derived from paid work.

Respondents for whom other roles are more important than their paid work role and these other roles are critical to the 'self.'

Decreasing levels of career self-concept

- Strongly identifies with paid work
- Enjoys work
- Puts pressure on self to be successful
- Work is fulfilling
- Highly developed skills and abilities
- Seeks opportunities
- Others would agree paid work is important
- Other roles besides work role
- Has many hobbies and interests
- Spends time with family
- Family and friends are most important things in life
Appendix H: Pilot (16-Item) Version of the Career Self-Concept Instrument

I am a student at the Ontario Institute for Studies in Education of the University of Toronto and am taking a graduate course with Professor Ruth Childs (rchilds@oise.utoronto.ca) on how to create questionnaires. This questionnaire is part of an assignment for that course. The purpose of this questionnaire is to explore sense of self among recent retirees. Your responses will be used only for the course and will be strictly confidential. Your completion of this questionnaire is voluntary. If you choose not to answer these questions, simply check the following box and return the questionnaire to Suzanne Cook, OISE/UT, 252 Bloor Street West, Toronto, ON M5S 1V6. If you have any questions, please email: scook@oise.utoronto.ca

Box: □

Please read each of the following statements. Indicate how much each statement describes you by circling your response: strongly agree (1), agree (2), somewhat agree (3), disagree (4) or strongly disagree (5).

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I know what my goals are in life.</td>
<td>Strongly Agree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>2. I recognize my talents and skills.</td>
<td>Strongly Agree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>3. I like learning new things.</td>
<td>Strongly Agree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>4. I always seek out opportunities to learn something new.</td>
<td>Strongly Agree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>5. I have many hobbies and interests.</td>
<td>Strongly Agree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>6. I identified myself with my paid work before I retired.</td>
<td>Strongly Agree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>7. Other people would say that my paid work was important to me.</td>
<td>Strongly Agree</td>
<td>Strongly Disagree</td>
</tr>
</tbody>
</table>
Pilot Version Career Self-Concept

8. I put pressure on myself to be successful at work.
   Strongly Agree  Strongly Disagree
   1  2  3  4  5

9. I did not enjoy my paid work
   Strongly Agree  Strongly Disagree
   1  2  3  4  5

10. My paid work was fulfilling
    Strongly Agree  Strongly Disagree
    1  2  3  4  5

11. I have many roles in life which are more important to me than my paid work role was.
    Strongly Agree  Strongly Disagree
    1  2  3  4  5

12. My coworkers were important for the enjoyment of my paid work
    Strongly Agree  Strongly Disagree
    1  2  3  4  5

13. I have always spent a lot of my time with family and friends
    Strongly Agree  Strongly Disagree
    1  2  3  4  5

14. I was always thinking about my paid work, even when I was not there.
    Strongly Agree  Strongly Disagree
    1  2  3  4  5

15. My family and friends are the most important things in my life
    Strongly Agree  Strongly Disagree
    1  2  3  4  5

16. My paid work did not require a lot of job or industry specific knowledge.
    Strongly Agree  Strongly Disagree
    1  2  3  4  5
Appendix I: The 10-Item Career Self-Concept Instrument

Please read each of the following statements. Indicate how much you agree or disagree with each statement using a check mark for your response.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I mostly think of myself as a retiree from my paid work or occupation.</td>
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<tr>
<td>I did NOT enjoy my paid work.</td>
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<tr>
<td>I wanted other people to view me as capable and competent in my paid work.</td>
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<tr>
<td>I put pressure on myself to be successful at work.</td>
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<tr>
<td>My paid work was fulfilling.</td>
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<tr>
<td>My paid work was only important to me because of the money it provided.</td>
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<tr>
<td>When I was working, I had other roles in life that were MORE important to me than my paid work role was.</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>My success in my paid work was important for my self-esteem.</td>
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<tr>
<td>I took pride in my work.</td>
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<tr>
<td>My paid work was the most important thing in my life.</td>
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</table>
Appendix J: Phase 2 Survey 10-Item Career Self-Concept Construct Map

Increasingly high levels of career self-concept

- Respondents whose self-concept is derived entirely from their paid work.
- Moderate amount of self-concept is derived from paid work.
- Small amount of self-concept is derived from paid work.
- Respondents for whom other roles are more important than their paid work role and these other roles are critical to the 'self.'

Decreasing levels of career self-concept

- Work was most important thing in life
- Strongly identified as retiree from paid work
- Enjoyed work
- Put pressure on self to be successful
- Success important to self esteem
- Work was fulfilling
- Took pride in work
- Viewed by others as capable and competent in paid work
- Other roles besides work role
- Work only important for the money

Increasingly high levels of career self-concept

Decreasing levels of career self-concept
Appendix K: Analyses of the Phase 2 (10-Item) Career Self-Concept Instrument

The pilot of the 16 career self-concept items lead to the development of a new instrument with 10 items that would measure career self-concept in the survey. The data from Phase 2 of this study were calibrated using ConstructMap (Bear Center, 2009; Wilson, 2005). A partial credit model was specified with the following 3 items reverse coded: Enjoyed Work, Money and Other Roles. As with the pilot of the instrument, the partial credit model was chosen because the data were not dichotomous and they did not represent a true scale with equal distances between ratings.

The First Partial Credit Model. The item estimates and fit graph are fit indices that examine the weighted mean squares and t-statistics for each item. The infit graph demonstrates that all 10 items fit within reasonable bounds – they are all between .75 (=3/4) and 1.33 (=4/3), which are considered reasonable upper and lower bounds for infit (Wilson, 2005). Thus, the overall finding is these data fit the partial credit model reasonably well.

An examination of the classical item statistics indicates that the outfit (mean square) is problematic for the following items: Think of Myself as a Retiree, Put Pressure on Myself to be Successful, and Money. For these three items, the outfit is greater than 1 and this value should be less than 1. Additionally, the outfit for Enjoyed Work is 1.01. The t-statistics for two items are slightly higher when compared to the other measures: Work is the Most Important is 6.33 and Think of Myself as a Retiree is 2.39. This may indicate a problem with variability among participants. Mean abilities do not increase in value across response categories for the following items: Viewed by Others, Fulfilling, and Other Roles More Important. This model had a Cronbach’s alpha of .66, which is low.
The construct map provides a visual representation of the respondent locations and the item responses, and shows the relationship between the logits and the probability of response. My hypotheses for item placement on the Wright Map were met with Work the Most Important Thing at the top of the map. Enjoyed Work, Put Pressure, Viewed by Others and Pride were in the middle, as expected. Other Roles and Money were placed low on the map.

The item characteristic curve for Work is the Most Important demonstrates that this item is not a good fit with the rest of the model – the data are skewed on this item and it may not be useful for distinguishing among people.

Test information curve for this model indicates that the most precise information is located in the middle of the curve. The test information curve demonstrates almost a linear relationship with little slope and two outlying variables; the linear shape is due to the low variability among the sample. The item characteristic curves indicate that the items Viewed by Others and Other Roles More Important had the least amount of participant variability.

The scale score estimates indicated that most of the participants scored high on career self-concept; they were all at the higher end of the continuum on this construct.

This model could demonstrate construct validity if it correlated meaningfully with a variety of different tests, such as a test of self-esteem derived from work, or a test on the enjoyment of work. This model should correlate most strongly with another test measuring career self-concept; however, there is no comparable test to examine construct validity. Super et al. (1996) used ability and interest tests, value appraisals, the life-role salience inventory and career maturity using the career development index to investigate career adaptability. These measurements do not tap career self-concept.
A decision was made to eliminate the Work Was Most Important item and rerun this partial credit model to see if the model could be improved.

**The Second Partial Credit Model.** The second partial credit model was rerun using 9 items. The fit graph demonstrates that 6 of the 9 items fit within reasonable bounds. The items Success, Fulfill and Put Pressure on Myself are below the lower bounds, indicating lower variability than expected. Thus, the overall finding is that based on infit, these data do not fit this partial credit model very well.

An examination of the classical item statistics indicates that the outfit (mean square) for the items Think of Myself as Retiree, Other Roles and Pride are problematic; the outfit value is higher than 1 for each of these items. This indicates a problem with variability among participants. The item characteristic curves for these items were all good, except for Pride and Viewed by Others which had low variability; all the participants tended to respond in the same way.

Removing the Work Was Most Important item in this model decreased Cronbach’s alpha to .64. While this is a negligible decrease in this reliability measure for internal consistency, it is a decrease nonetheless.

The item Success was an outlier on the construct map, being situated away from the other items, with Pride and to a lesser extent, Put Pressure on Myself, high on the map. The other items discussed above as having higher outfit were well positioned. The map indicates that most participants have moderate to high levels of career self-concept; most of the participants are clustered around the high end of the map. The ordering of the items and their responses on the map for the most part indicate that items hypothesized to have higher levels of career self-concept are situated higher, and lower items are at the bottom of the map.
Based on this analysis, a decision was made to eliminate the Think of Myself as a Retiree and Other Roles items and rerun this partial credit model to see if the model could be improved.

The Third Partial Credit Model. The third partial credit model, consisting of 7 items, was rerun. The fit graph demonstrates that 5 of the 7 items fit within reasonable bounds. The items Success and Fulfill are below the lower bounds, indicating lower variability than expected. Thus, the overall finding is that, based on infit, these data do not fit this partial credit model very well.

The classical item statistics indicates that the outfit (mean square) for the item Pride is problematic as the outfit value is higher than 1, indicating low variability among participants. The item characteristic curves for these items were good, except that responses 3 and 4 on the item Viewed by Others are not distinct from each other.

Removing the Think of Myself as a Retiree and Other Roles items in this model increased Cronbach’s alpha to .76, and this statistic indicates this is a good reliability measure for internal consistency. The items Success, Put Pressure on Myself, Pride were outliers on the construct map, being situated away from the other items. The other items were well positioned. Again, this map indicates that most participants have moderate to high levels of career self-concept. The ordering of the items and their responses on the map for the most part indicate that items hypothesized to have higher levels of career self-concept are situated higher, and lower items being at the bottom of the map.

The test information curve for the Third Model demonstrated a linear slope with hooks at each end. This is not ideal; however, the lack of variability with participants probably indicates that only one end or tail of the scale is being tapped.
Based on this, a decision was made to eliminate the items Success and Fulfilling and rerun this partial credit model to see if the model could be improved.

**The Fourth Partial Credit Model.** The fourth partial credit model, consisting of 5 items was rerun. The fit graph demonstrates that all 5 of the items fit within reasonable bounds. The classical statistics indicate that the item Pride was higher than 1, indicating less variability; however, Cronbach’s alpha was calculated at .65 and this is very low. The construct map showed that Pride was an outlier and most respondents were distributed on one half of the map, indicating that they have moderate to high levels of career self-concept. The test information curve was linear and had greater spread than previously.

Based on this, no further analysis of this model was conducted. Success and Fulfilling were added back into the model and Pride was eliminated.

**The Fifth Partial Credit Model.** The fifth partial credit model, consisting of 6 items, was run. The fit graph demonstrates that 5 of the 6 items fit within reasonable bounds. Pressure is below the lower bounds, indicating lower variability than expected. Thus, the overall finding is that based on infit, the data for this item does not fit this partial credit model very well.

An examination of the classical item statistics indicates that the outfit (mean square) for the items Enjoy, Money and Success are problematic as the outfit value is slightly higher than 1, indicating less variability among participants. The item characteristic curves for these items were all good.

Adding in the items Success and Fulfilling and removing Pride from this model increased Cronbach’s alpha to .72, and this statistic indicates this is a good reliability measure for internal consistency.
The item Success was an outlier on the construct map, being situated away from the other items. Enjoy was a bit lower on the map than expected; however, the other items were well positioned, with items hypothesized to have higher levels of career self-concept situated higher, and lower items at the bottom of the map. This map indicates that most participants have moderate to high levels of career self-concept.

Finally, when compared to the hypothesized construct map, all of the items on the construct map from this model are in the order hypothesized. While this is the case, this model was rejected because of the poor measure of internal consistency and because the item Enjoyed Work was not located on the map in the position hypothesized.

**Conclusion**

The process of model development helped in choosing and eliminating items that were a poor fit for the construct of career self-concept. During this process, Cronbach’s alpha, the reliability statistic, increased from .66 to .76. Validity could be examined through correlation with another instrument that taps the same construct, but none is available.

In conclusion, the third partial credit model was chosen because it is the model with the best reliability for internal reliability and the best distribution of respondents and items on the construct map.