

# TRANSITIONS, MILESTONES, AND LEGACIES

## VOLUNTEERING AND RETIREMENT PLANNING

### VOLUNTEERING

HOW DOES  
VOLUNTEERING FIT IN TO  
RETIREMENT PLANNING?

WHAT KIND  
OF VOLUNTEERING  
SHOULD I CONSIDER?

HOW DO I FIND  
VOLUNTEERING THAT  
IS RIGHT FOR ME?





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## Introduction

As people enter into retirement or transition in their lifecycle, many seek new options to engage in their communities and to maintain, grow or develop new skills. Volunteering is increasingly espoused as a retirement planning option, for it provides people with opportunities to stay active, learn, share and leave a legacy for future generations. This module can be used independently or incorporated as part of a more comprehensive retirement planning exercise. It is designed to highlight the benefits of volunteering as a retirement planning option, and to present opportunities that will help people find a satisfying volunteer opportunity.

Your experience, wisdom, and time are the most valuable things you can offer. Maybe you have volunteered in the past but your busy life has kept you away for a while. Perhaps volunteering has never been part of your lifestyle before now. Our communities need every single one of us and we all need to discover and take our places and spaces in our community. If you are considering stepping away from the structure and demands of full-time work, are continuing, resuming, or trying volunteering for the first time, this module may be helpful.

- ▶ **Identify how volunteering can fit into lifecycle transitions and retirement planning;**
- ▶ **Explore the various types of volunteering available, and**
- ▶ **Discover a volunteering opportunity that fits with your motivations and life circumstances.**





# How does volunteering fit in to lifecycle transitions and retirement planning?



There are numerous circumstances that you may find yourself in as you move throughout your lifecycle. Book stores and information racks are filled with material to help people plan for a range of considerations, including family life, finances, housing, travel, recreation, health, and life-long learning. Volunteering can play a key role at every stage but it can also serve as a vehicle to help you through these transitions. Volunteering can serve to heighten one's quality of life today and act as a legacy for the future.

Whether your transition or retirement involves a change in your household, neighbourhood, health situation, employment status, or daily schedule, volunteering can provide extra meaning to your days. It can connect you to your community, help maintain, grow or develop new skills, facilitate your participation in the democratic process, and help you shape and preserve the society you want to live in for yourself and for generations to come.

## TYPICAL CONSIDERATIONS IN TRANSITION AND RETIREMENT PLANNING:



An important part of transition planning is exploring how volunteering fits in and actually connects to these important considerations. The baby boomer generation (born between 1946 and 1964) runs the gamut of points in their life cycle and life circumstances, with respect to work, family, and partnerships. All of this influences the interests, availability, personal goals and motivations that one may have for volunteering.







## FINANCIAL PLANNING

Greater numbers of people are looking for ways to contribute to the community by giving both time and money to the causes they care about. For those who are considering charitable donations and bequests to non-profit organizations as part of their financial planning, what better way to really know an organization than through volunteering? This can give people the insider's view on the organization's values, culture, programs, and leadership. It will also give you an opportunity to maximize your impact.



## TRAVEL

*Voluntourism*, combining volunteering and touring is a very appealing option for many people in transition or retirement. Many international development organizations offer opportunities to volunteer anywhere from 2 weeks to 2 years to work on projects such as mentoring small businesses, providing technical support for emerging industries, setting up schools, rebuilding housing, providing health and social services to refugees, staffing clinics, teaching English, as well as many other projects.



## RECREATION

Whether your pleasure is swimming, softball, playing chess, or riding horses, you can combine this with important volunteer roles in the community. Being a swimming buddy with someone with a physical disability, being a coach for a little league team, playing chess with youth in a drop-in centre, or grooming ponies in a therapeutic riding program, your time will be very well spent. Volunteering can also open up new recreational avenues that you have not considered before, such as playing cribbage, winter camping, being part of the chorus in a musical, or building a haunted house.



## FAMILY TIME

If your time with family is important to you, consider family volunteering. Helping with activities in a nursing home, sorting donations in a food bank, or making decorations around your kitchen table for a special event; there are many volunteer activities that can be done by people of all ages and abilities. If you are looking for more time with family, there may also be volunteer opportunities in your grandchildren's school, the nursing home where your aunt is living or the drop-in centre where your partner gets support dealing with his or her illness.



## LIFE-LONG LEARNING

Volunteering is a way to transfer skills<sup>1</sup> whether you want to contribute the skills you have gained or you wish to learn new skills, volunteering can help you prepare for a new career or feed your hunger for learning new things. Volunteer to research social policy issues and learn more about the root causes of homelessness, get trained on desk-top publishing programs as a volunteer editor of an organization's newsletter, or find out more about fossils during orientation as a tour guide in the museum of nature.



## HOUSING

If you are approaching a transition that includes moving, volunteering in your neighbourhood is a great way to get more connected to your new surroundings. Whether you volunteer to serve on the social committee of your condo association or housing co-operative, take a shift at the information booth at the community centre, or join a team of door-to-door canvassers, volunteering will help you meet your neighbours. If your move means that you no longer have the garden you have always loved, volunteering in a community garden can help fill the gap.



## HOBBIES

You have always had a great eye for a good picture or you can spend hours working on your family scrap book. You like to keep your hands busy while you watch the evening news or you are an avid stamp collector. Volunteering to take photos at an organization's anniversary gala, creating an archive album for the local service, knitting layettes for young single parents, or leading a stamp club at the local high school can link your hobby to important community programs. This is the ideal approach if you want to volunteer in areas that are totally different from your work life and can also be done with groups of friends, as a project of your social club, or with your bowling team.



## HEALTH

Many studies have shown the health benefits of volunteering such as reduced stress-related illnesses, an enhanced sense of self-worth, and the prevention of social isolation.<sup>2</sup> There are also times in your lives when your health situation does not permit you to be as active as usual. You may want to volunteer for an organization that is directly connected to the health issue that you or your family is dealing with. Virtual volunteering (off-site and on-line) or micro-volunteering (moments of helpfulness) have become part of the volunteering landscape. With a wide spectrum of volunteering opportunities available, you can find something that needs your experience, time, and skills that suits your particular situation.

<sup>1</sup> Volunteer Canada (2010). *Bridging the Gap – Enriching the Volunteer Experience to Build a Better Future for Our Communities*. Research Summary Report, [http://volunteer.ca/files/Bridging\\_the\\_Gap\\_English.PDF](http://volunteer.ca/files/Bridging_the_Gap_English.PDF)

<sup>2</sup> The National Seniors Council. (2010). *Report on the National Seniors Council on Volunteering Among Seniors and Positive and Active Aging*. HRSDC. [http://www.seniorscouncil.gc.ca/eng/research\\_publications/volunteering.pdf](http://www.seniorscouncil.gc.ca/eng/research_publications/volunteering.pdf)





## SPECTRUM OF VOLUNTEER ENGAGEMENT

BEING INFORMED > BEING SUPPORTIVE > ACTIVE PARTICIPATION > LEADERSHIP >

### EXAMPLES ALONG THE SPECTRUM OF VOLUNTEER ENGAGEMENT

- ▶ Informing yourself about an issue by reading a blog or posting
- ▶ Helping to raise awareness about an issue (circulating/posting material yourself)
- ▶ Creating/ contributing to momentum about a matter of public concern (creating a petition or signing/circulating a petition)
- ▶ Participating in chats/e-forum on an issue
- ▶ Organizing/initiating a chat/e-forum about an issue
- ▶ Volunteering at a special event of an organization
- ▶ Volunteering on a short-term project/assignment
- ▶ Volunteering on a regular basis
- ▶ Being on a board of an organization or chairing a major campaign



# What kind of volunteering should I consider?

The baby boomer generation gave rise to DINKS (Double Income No Kids), Yuppies (Young Upwardly Mobile Professionals), blended families, and the sandwich generation (caught in between caring for aging parents and young adult children). Children of boomers are staying at home longer and coming back home in between work, travel, school, and relationships. With shifts in the economy, some people have had buy-out packages that have enabled them to retire early, start home-based consulting businesses, or go into second careers. Others are choosing a phased-in retirement, and are seeking employer-supported volunteering opportunities.

To help you explore the types of volunteering to consider, ask yourself the following questions:

1. Where am I in my life now? What are my current circumstances and what is up ahead?
2. What do I care about? How can I make a difference? What kind of volunteer would I be?
3. What skills or experience do I have to offer or do I want to gain?

## WHERE DO YOU FIND YOURSELF ON THE CHART BELOW AND WHAT IS UP AHEAD?







## WHAT DO YOU CARE ABOUT?

There are a number of tools that help you explore what matters to you most and how you can best volunteer your time. You can find out whether you're most concerned about health, social services, the environment, literacy, social justice, education, sports, recreation, human rights or international development. You can also find out what your "volunteer type"<sup>3</sup> is. The VQ- is a volunteer quiz that will help people discover their volunteer type and match them to volunteering opportunities and organizations that suit their personalities, interests, skills, & talents. Examples of volunteer types include:

### What volunteer type do you think you are?

- Groupie** You thrive on the camaraderie of a group and like to have fun and get results
- Juggler** You're a dynamo who enjoys giving your time to a variety of organizations
- Cameo Appearance** You have an unpredictable lifestyle and cannot be a regular
- Rookie** You're cautious but you've started to think it's time to give back
- Roving Consultant** You're incredibly focussed and want to volunteer your specialized skills
- Type A** You're a multi-tasking leader who says yes often and means it

Check out the VQ [here](#)

## *What skills, competencies or experience do I have to offer or do I want to gain?*

Whether you are making a transition within your workplace, to another career, or to retirement, you may want to use a skills-based approach to searching for volunteering. Alternatively, you may want to do something indirectly related or something completely different. The following competency matrix was developed to help link volunteer experience with core competencies in a range of occupations, in a tool called **Skills-Plus**.

The purpose of Skills-Plus is to facilitate the linkage between volunteer experience and occupational core competencies so that:

- Nonprofits can structure volunteer opportunities to access workplace skills and competencies
- Workplaces can strategically support employee volunteers to meet community and competency-development goals
- Both non-profits and workplaces can use the tool as the basis to define and measure benefits, value and the return on investment (ROI) of employer-supported volunteering

Using the matrix on the following page, check off which skills, competencies, or aptitudes you feel you have to contribute and/or which you would like to develop. Then follow the link at the bottom of the page to a tool that will show you a number of sample volunteer opportunities that require the competencies that you identified, or that provide you an opportunity to develop the skills you highlighted.



# Competency Matrix



Please check off which competency or aptitude you feel you have to contribute and/or which you would like to develop

## INTERPERSONAL

- client service
- team building
- collaboration
- coaching
- consultation
- network building
- supervision
- cultural awareness/sensitivity

## COMMUNICATION

- interpersonal communication
- communicate in plain language
- supportive communication
- public speaking/presentation skills
- facilitation and training
- conflict resolution
- public and media relations
- written communication

## ORGANIZATIONAL

- analysis
- needs assessment
- plan and co-ordinate
- manage meetings and groups
- change management
- project management
- systems thinking
- time management

## TECHNOLOGY OR ADMINISTRATION

- process management
- computer skills
- increased knowledge
- non-profit sector knowledge
- understanding diversity
- community knowledge/awareness
- self knowledge

## FUNDRAISING (AND FINANCE)

- fund development
- event management
- resource management
- financial planning

## LEADERSHIP

- develop others
- motivate others
- decision-making/prioritizing
- strategic thinking
- creative thinking
- problem solving
- thought leadership (innovation)
- stewardship

## PERSONAL QUALITIES

- sensitivity
- accountability
- empathy
- adaptability
- respect
- ethical framework
- continuous learning
- self-motivation
- flexibility



# How do I find a volunteer opportunity that is right for me?



Based on the questions and tools introduced in this module, complete the following questions:

1. What transition are you preparing for (full retirement/phased-in retirement/other)?

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2. Would you like to link volunteering with another consideration in transition or retirement planning?

- Family time
- Finance
- Travel
- Recreation
- Life-long learning
- Health
- Housing

3. What issues, causes, or organizations do I care about?

- Arts & Culture
- Environment
- Health & Wellness
- International Development
- Social Services & Justice
- Youth & Education

4. With whom and where do I want to volunteer?

- On my own
- In a group
- With family
- At home
- Over seas

5. What volunteering schedule suits you?

- Occasional
- Short Term/Seasonal
- On-call
- Flexible
- On-Going

6. What's your VQ? ([Take the quiz here](#))

7. Contact your volunteer centre ([Link to directory here](#))

8. Check out the opportunities available at [Get Volunteering](#)