

# Empowering Older Volunteers: Learning to Research

Lee-Ann Fenge, Institute of Health and Community Studies, Bournemouth University.

---

## Abstract

*This paper reports on a United Kingdom Open College Network (OCN) accredited training course in Community Survey Research for older people involved in community based research activities. It was funded through Older and Bolder, an initiative of the National Institute of Adult Continuing Education (NIACE) in England and Wales, and was developed by Bournemouth University in collaboration with Bournemouth and Poole College. The course was offered to older volunteers at Help and Care, a voluntary sector agency working with older people and their carers in Bournemouth, Poole and Dorset. It was felt that these volunteers might be interested in attending a structured programme on Community Research, which could be accredited by the OCN, which would assist them in their voluntary roles particularly in terms of research and service evaluation. Before the course commenced, participants spoke about hoping to feel more confident about engaging in research and to be involved in more formal learning. By the end of the eight-week course participants appeared enthused about learning and engaging in future research. Issues raised by this pilot project are discussed, particularly in terms of funding future schemes.*

## Keywords

Older people, age discrimination, empowerment, volunteers, life long learning, higher education, evaluation, action research.

## Rationale

Ageism represents a key feature of the discrimination and oppression that many older people experience, and therefore the fundamental basis of practice with older people must be anti-ageist. Central to this is recognising that older people as a group are subject to discrimination and exclusion on both macro and micro levels within society (Thompson, 1998). One way to tackle discrimination and social exclusion is to involve and value older people more within the communities in which they live, through voluntary activity and community participation which allow older people to challenge ageist stereotypes and have a voice in setting the agendas that impact upon their lives.

The rationale for the development of the Community Research course described here is that it supported these notions of equipping older people with the necessary skills to empower them to contribute to community research projects and evaluations, and to have a voice in setting the agendas as envisaged by organisations such as *Better Government for Older People*.

## Introduction

This paper reports on the development of a Community Survey Research course which was developed by Bournemouth University in collaboration with Bournemouth and Poole College. The course was delivered to a small group of older volunteers from Help and Care, a voluntary sector agency working with

older people and their carers in the South of England. It was developed as a small pilot project and delivered with funding from *Older and Bolder*, a NIACE initiative to engage older people in learning, and offered the opportunity of an accredited unit of learning through the National Open College Network (OCN). The Open College Network provides accreditation services for adult learning, and works in partnership with organizations to develop learning strategies for adult learners in order to widen participation and access to education. A steering group was established to develop the project and was made up of representatives from Help and Care, Bournemouth University, Bournemouth and Poole College and *Older and Bolder*.

The Community Survey Research course was developed in light of growing awareness within Help and Care that their volunteers were increasingly being asked by the statutory sectors to become involved in researching and evaluating services. The steering group felt that some formal learning could be offered to empower volunteers by equipping them with more knowledge and understanding of research to undertake these roles effectively. The option of accredited learning was felt to be important for some volunteers and, as a result, it was agreed to design a unit of learning that could be accredited through the Open College Network.

## **Background**

The course was developed at a time of government emphasis on public involvement in service development and delivery, and recognition within research of the importance of user-led approaches to enquiry and inclusive processes of theory development (Beresford, 2000). Service users and patients are being increasingly encouraged to contribute to

research and evaluation of the services and policies which affect them. For example, Section 11 of the Health and Social Care Act (2001) places a duty on National Health Service (NHS) institutions to make active arrangements to involve and consult patients and the public in planning services, and developing proposals for change in service delivery and service operation. Patient and public involvement (PPI) forums have been established as part of the government's agenda to put patients at the centre of everything the NHS does. This was first set out in the NHS Plan (Department of Health, 2000a), which included an expansion of the 'Expert Patient Programme', and the forums were defined in legislation in the NHS Reform and Health Care Professions Act (2002).

The needs of older people have been acknowledged by government policy and rhetoric over recent years. Government policy has highlighted the importance of user expertise (Modernising Social Services, DH 1998; The NHS Plan, DH 2000a). Participation and empowerment are key themes of this policy (A Quality Strategy for Social Care, DH 2000b), and the interface between the knowledge of professionals and 'situated knowledge' of service users is becoming important in both service delivery and research (Nolan *et al.*, 2001: p2).

Recent policy and rhetoric have promoted 'user' focused approaches to practice. On a micro level, this acknowledges the role that service users have in defining their own needs within assessment processes (A *Quality Strategy for Social Care*, DH 2000b), and on a macro level it leads to increased emphasis on participation in the policies and agencies which affect their lives. *Better Government for Older People* was established by the Cabinet

Office in 1998, and is a UK-wide programme which aims to improve public services for older people. It involves partnerships between central government, local government and the voluntary sector and aims to involve older people in inter-agency strategies which affect their lives. More recently, the Government has highlighted its intention to open up 'opportunities for older people to learn, ...and be involved in volunteering' (p31), when it launched its older people strategy, *Opportunity Age: Meeting the Challenges of Ageing in the 21<sup>st</sup> Century* (Her Majesty's Government, 2005).

Government policies such as the *National Service Framework for Older People* (DH, 2001) and *Opportunity Age* (Her Majesty's Government, 2005) have also highlighted the need to tackle ageist practice but to implement this policy changes need to be made concerning the negativity associated with ageing. One way of achieving this is to encourage older people to participate in their local communities and to raise the 'voice' of older people by engagement in community research activities.

### **Social exclusion and community participation**

The concept of social exclusion has been described as a 'leitmotif' in policy initiatives in a number of countries (Jarman, 2001). The Commission of the European Union (2005) has highlighted social exclusion as a key theme within social policy in Europe and 'participation' is seen as being central to this policy.

The inability to 'participate' or restrictions placed on participation are central to this discussion. Participation is a central concept within the social exclusion debate and one way of viewing participation is to consider it as a 'citizenship right' (Lister, 1998). This

approach views citizenship in terms of participation, and as such participation 'can be understood as representing an expression of human agency' (Lister, 1998, p27). This could be seen in terms of political activity or voting, but also through less formal means such as participation in local community activity.

For many older people 'participation' may be prevented by ageist assumptions about the value of older people within society and the negative connotations attached to ageing within a western culture. This view suggests that it is not the case that older individuals choose not to participate, as might be suggested by decline models of ageing and approaches such as disengagement theory (Cumming and Henry, 1961). Rather, it indicates that they are prevented from doing so by a society that places a premium on youth and views old age as a time of invisibility and dependency.

Much of the focus on social exclusion has been on younger people, specifically concerning the impact of unemployment, poor education, poverty and poor housing. Research by Riseborough and Sribjlanin (2000) found evidence that older people are often 'invisible', either as beneficiaries or participants, within regeneration schemes and community development projects. They suggest that older people are often marginalised within the social exclusion debate and that 'attention to community most frequently takes account of young people of working and school age' (p16).

For older people, becoming involved with community based projects may help dispel some of the myths surrounding ageing and allow older people to share their experiences and views with agencies and the wider society. This is

acknowledged through schemes such as *Better Government for Older People*.

### **Empowering older people through education and research**

The *Older and Bolder* initiative through NIACE sets out to promote wider learning opportunities for older people, to encourage partnerships between Further Education, Higher Education and community organisations, and to widen participation by older adults in all forms of learning.

Traditionally older people have been excluded from the widening participation debate, as this has tended to focus on education as an instrument to employment. The Government in both the recent White Paper (Department for Education and Skills, 2003) and the previous key policy documents such as the Dearing Report (Dearing, 1997) sets the context of widening participation in education within that of economic competitiveness. This frames the benefits of higher education in terms of employment and economic benefits to the individual as well as to society as a whole. Older people, on the basis of being retired from employment, are excluded from this debate. It is, therefore, unsurprising that the National Adult Learning Survey (Fitzgerald *et al.*, 2002) suggests that older people (those aged 70 years and over) are the least likely group of adults to be engaged with learning (p19). When they do engage in learning, it tends to be on non-vocational, non-accredited courses (NIACE, 2002).

An alternative approach is offered by the social rights discourse which stresses the 'rights' of older people to education and participation as citizens (Withnall, 2002). This views access to education for older people as a right, but also as an instrument to challenge social exclusion

by increasing participation of older people.

This equates with the empowering nature of education. Empowerment, although a contested concept (Means *et al.*, 2003), can refer to user participation in services and to the self-help movement generally, in which groups take action on their own behalf, either in cooperation with, or independently of, the statutory services (Thomas and Pierson, 1995, pp134-135). Education can therefore empower individuals and communities, and this is supported by the Social Exclusion Unit's final report on *Excluded Older People* (OPDM, 2006) which reports that participation in learning offers many benefits to individuals concerning health and well being of both individuals and communities (p12).

The Open College Network aims to widen participation and access to education, and to promote social inclusion through education. Participation and inclusion are important if older people's views and perspectives are to be taken on board by agencies and wider policy initiatives, and as Wilkinson and Capener (1997) suggest:

*For older people in particular, participation in education and training represents a major way in which they can contribute to the life of the community.*

p158

Elmore (1999) has advocated older people's access to education based on social justice and citizenship. In this approach, education is seen as an empowering experience, and one that should support older people with 'the acquisition of skills to enable them to continue to contribute as full members of the community' (p13). Similarly, Cusack (1999) talks of the empowering nature of education for older people and suggests the need to reframe old notions

of power ‘to embrace ‘power to’ and ‘power with’ approaches, .... enabling seniors to play a greater role in setting the community-based research agenda’ (p26).

### **Aims of project**

This pilot project was focused on the aims of the NIACE *Older and Bolder* initiative which included encouraging partnerships between further and higher education institutions and voluntary sector organizations in developing provision. This development was a collaborative activity which involved Further Education (FE) Colleges that had access to the OCN accreditation process, Higher Education (HE) institutions that already had research links with the voluntary sector, the voluntary sector itself, and *Older and Bolder*.

In developing this OCN accredited course, the steering group reviewed a research training programme developed by Leamy and Clough (2001) at Lancaster University which formed part of a research project called ‘Housing decisions in old age’ (Leamy & Clough, 2006). The practical element of the course involved undertaking 10 interviews with older people as part of the housing study. The course was offered to older students so that they could develop a wider theoretical understanding of research and practical interviewing skills.

We felt that the demands of the Lancaster course were too great for our intended learners as it ran over two terms and was a 30 credit unit requiring the completion of four assignments equivalent to 6,000 words (Leamy & Clough, 2001, 2006). The steering group thought that such a demanding course, both in terms of time commitment and amount of work expected to be completed by the students

would discourage volunteers coming forward. The target market was older people currently involved in voluntary activity, who may or may not be currently involved in a research project.

The aims of the Community Research course were to introduce learners to research methods, including questionnaire design, sampling, interviewing, and analysis. It was acknowledged that potential participants could have different research experience, ranging from those who might be actively engaged in a research project such as *Gay and Grey* to others who had little experience but hoped to become involved at some future date. Unlike the Lancaster model, undertaking interviews for a research project was not part of the pilot.

Within the OCN Credit Framework, a specific definition of credit has been developed in respect to the learning outcomes which a learner, on average, might reasonably be expected to achieve in 30 Hours of Learning.

The steering group decided to focus the learning around level 1 of the OCN Credit Framework, which is equivalent to NVQ1 or GNVQ Foundation level. This level is focused on the acquisition of a foundation of competencies, knowledge and understanding of a limited range of predictable and structured contexts that prepare the learner to progress further (National Open College Network, 2005). By focusing on learning at level 1 it allowed for future course development level 2 or 3 if there was felt to be the interest or need.

The course was structured around 30 hours of learning, which was offered through workshops running over 8 weeks from 10a.m.-2p.m. Fees were covered by the *Older and Bolder* funding and it was therefore offered free

of charge to participants. Funding also supported the cost of participants' transport to the venue and lunch and refreshments. It was felt that charging for the programme would deter potential participants, as would costs incurred in transport, so these potential obstacles were removed.

### The programme

The pilot project was designed as an introduction to community survey research, and the basis for developing more in-depth learning in the future. All participants in the Help and Care Strategy group were invited to attend, as were all participants on a parallel *Gay and Grey* Research project. The pilot aimed for about eight participants. However, due to illness and other commitments only five participants were able to attend the whole course. Two had previous experience of higher education, whereas the other three had no formal qualifications, although a good deal of experiential knowledge. All were over 55 years of age, the oldest being 84 years old. All course

participants were told that they were attending a pilot project to explore the potential of offering future research teaching to older volunteers.

The learning outcomes of the course included:

- understanding the most appropriate research methods to implement community research;
- questionnaire design;
- the use of interviews;
- sampling;
- the use of codes of practice;
- piloting;
- recording; and
- analysis and presentation of results.

On the first day the participants were asked to explore their hopes and fears, shown in Table 1, which demonstrated that they were concerned about the level and amount of work involved, although keen to undertake more formal learning.

**Table 1: Participants' hopes and fears at the beginning of the course**

Hopes	Fears
To feel confident enough to start own research project.	The level of learning and amount of work expected from tutor.
To assist me in my work as a member of the older people's strategy group.	Concerned that work will be too complicated.
To learn something new.	Fear of being seen as unable to spell.
To learn about the use and design of questionnaires.	Fear of having own weaknesses highlighted.
To learn how to get the views of others.	
To enjoy research.	
To be involved in more formal learning.	

It was explained to the participants that they could choose to submit a portfolio to provide evidence of their learning which would be assessed as an OCN accredited unit of learning. This seemed important to them, as did the university's involvement with the course, which seemed to validate the experience as being important and worthwhile. The importance attached to this being a course run by the university was not something that the steering group had considered during the development process. In the end, three out of five participants submitted a portfolio of evidence, whilst the remaining two decided that they had not attended the course for a 'qualification' and therefore chose not to pull together their portfolios.

Each session was geared around activities to engage learners in discussion of the themes, from exploration of 'spoof' questionnaires to discussion of questionnaires that group members were involved in developing as part of their voluntary work. Participants also began to view more critically questionnaires which they received through the post, and all of them brought in questionnaires that they had received as part of this process.

Activities were provided for each session, alongside guidelines for reflections on their learning during each session, and the evidence used to demonstrate this. Participants were provided with materials to demonstrate their learning, as well as reflective templates for each learning outcome, on which they could map their learning.

In order to assess their understanding of questionnaire design, and as not all participants were currently involved in outside research projects, it was decided to set the participants the task of

designing a questionnaire to evaluate the Community Research course.

### **Evaluation of the course**

As a pilot project, this was a learning experience for me as a lecturer, as well as for the participants. One of the participants, in a session where we were exploring different approaches to research, compared the experience of the pilot project to an action research project. She felt that the participants could influence how the course was run, as well as having an input into any future plans for such courses.

Action research is considered to be a style of enquiry incorporating a variety of diverse practices, as opposed to being a research methodology in itself, characterized by a rigid set of rules (Gray, 2004). Although not formally designed as an action research project, a collaborative group relationship (Titchen and Binnie, 1993) was established between the five participants and the lecturer. Participants were encouraged to reflect on the Community Survey course and a variety of evidence was explored including participant hopes at the beginning of the course, end of course feedback, informal group discussion and portfolio evidence.

At the end of the course, students were asked for written feedback concerning the positive and negative aspects of the course, summarised in Table 2. On the whole, feedback was very positive, although the small group size was noted as a negative aspect.

The fears expressed by participants at the beginning of the course concerning the level of work required were unfounded according to the end of course evaluation. All participants enjoyed attending the course and found the atmosphere friendly and non-threatening. Three out of five

participants reported that they were satisfied by the level and amount of work offered by the course, whereas the two participants who had prior experience of higher education said they would have welcomed reading lists and ‘homework’ activities. This raises the issue of participant expectation and prior learning experiences. In designing such

community learning courses, it can be difficult achieving the right level for all participants, where participants have a range of prior educational experience. Despite these differences, all five reported that they would be willing to undertake future courses if they were offered, and one went on to register on an Open University course.

**Table 2: Positive and negative aspects of the course**

Positive aspects of the course	Negative aspects of the course
<p>Relaxed atmosphere, given the opportunity to participate, structured and plenty of handouts.</p> <p>Group work, discussion, and atmosphere.</p> <p>Easily explained.</p> <p>The friendly atmosphere throughout treated with respect – as adults, the casual/non-regimental/non-formal approach.</p> <p>The banter - found the whole thing interesting.</p>	<p>We sometimes lost focus [too many] personal reminiscences!</p> <p>Would like more on use of statistics and how to disseminate results.</p> <p>More people could have joined us (only five in group).</p>

Throughout the course, participants were encouraged to reflect upon their learning from each session. A template was given to them to facilitate this process, which could then be included in their portfolio. On this template, participants were asked to give examples evidencing their learning, which they could cross-reference to activities undertaken in sessions. In some of these evidence sheets, there were elements of peer assessment, as they were required to get feedback from the other participants of their contribution to group activities.

The process of reviewing their learning within their portfolio, and pulling their portfolios together allowed the participants to acknowledge the learning they had undertaken during the course. They left the course not only with a portfolio of evidence but also with more confidence about undertaking research,

feeling equipped to inform the wider strategy groups within Help and Care about issues related to research. They appeared empowered through their learning, and were keen to explore how what they had learned could be applied in terms of future community research activities within Help and Care.

**The future**

The Government in its older people’s strategy *Opportunity Age: Meeting the challenges of ageing in the 21<sup>st</sup> Century* (Her Majesty’s Government, 2005) has raised the profile of older people as learners and volunteers. They are increasingly being encouraged to engage as ‘active citizens’ in their communities, and one of the ways of achieving this is through undertaking roles as volunteers in community based research and evaluation projects. However, to

undertake these roles and to set the research agenda, rather than be merely used as research participants, they need to gain more knowledge and understanding of research processes. This is important when we consider the way in which knowledge and theory about older people are generated, and the need for more 'inclusive' models (Beresford, 2000).

This small pilot project has demonstrated that older people can enjoy learning about research, and can become more empowered as volunteers and potential researchers as a result. This type of learning needs to be offered in a non-threatening way, particularly for participants who may have no prior formal qualifications. It is also important that participants do not feel overwhelmed by the level and amount of work required, and this confirmed our initial decision to offer a relatively short course aimed at level 1 OCN accreditation.

The importance of collaborative working has also been confirmed by this project. The involvement of the University in delivering the programme seemed to be important to the participants. They enjoyed the attendance days at the University, the chance to visit the library and use onsite resources. This seemed particularly important for the three participants who had no prior higher education experience.

A key issue in the delivery of such learning in future is funding. This research programme of learning was provided free of charge to participants due to the funding available through *Older and Bolder*, and was only achieved as a direct result of the collaboration between higher education, further education, the voluntary sector and the *Older and Bolder* initiative. All of the participants reported that they

would not have attended if they had been charged. However, funding for adult education is becoming increasingly squeezed with budgets from the Learning and Skills Council being cut by £55 million during 2005-06 (NIACE, 2005).

The emphasis on widening participation in learning for the 16-19 years age group will have a detrimental impact on both the future availability of learning opportunities for older people and the fees required for participants to attend courses. Although the Government uses the rhetoric of participation and learning for older people, adult learning funding policy is restricting learning opportunities to those very groups. This does raise the question of whether there is a real commitment to challenge ageist practice, to fully include older people within society, and to enable them to take on the roles of active citizens that are envisaged by *Opportunity Age* (Her Majesty's Government, 2005).

### Acknowledgements

The author would like to thank the course participants, and Dr Steven Keen for his thoughtful comments on previous drafts of this paper.

### References

- Beresford, P. (2000). Service users' knowledges and social work theory: conflict or collaboration? *British Journal of Social Work*, 30 (4): 489-503.
- Cumming, E. & Henry, W.E. (1961). *Growing Old*. New York: Basic Books.
- Cusack, S. (1999). Critical educational gerontology and the imperative to empower, *Education and Ageing*, 14 (1): 21-37.
- Dearing, R. (1997). *Higher Education in the Learning Society: Report of the*

- National Committee of Inquiry in Higher Education*. London: HMSO.
- Department for Education and Skills (2003). *Widening Participation in Higher Education*. London: DfES Publications.
- Department of Health (1998). *Modernising Social Services: Promoting Independence, Improving Protection, Raising Standards*, Cm 4169. London: Stationery Office.
- Department of Health (2000a). *The NHS Plan*. London: Department of Health.
- Department of Health (2000b). *A Quality Strategy for Social Care*. London: Department of Health.
- Department of Health (2001) *National Service Framework for Older People*. London: Department of Health.
- European Commission: Directorate-General for Employment, European Commission: Directorate-General for Employment Social Affairs and Equal Opportunities. (2005). *Joint Report on Social Protection and Social Inclusion 2005*. Luxembourg: Office for Official Publications of the European Communities.  
[http://ec.europa.eu/employment\\_social/social\\_inclusion/docs/jointreport\\_2005\\_en.pdf](http://ec.europa.eu/employment_social/social_inclusion/docs/jointreport_2005_en.pdf).
- Elmore, R. (1999). Education for older people: the moral dimension. *Education and Ageing*, 14 (1): 9-20.
- Fitzgerald, R., Taylor, R. & LaValle, I. (2002). *National Adult Learning Survey, Research Report 415*. London: National Centre for Social Research, DfES.
- Jarman, J. (2001). Explaining Social Exclusion. *International Journal of Sociology and Social Policy*, 21 (4, 5, 6): 3-9.
- Gray, D.E. (2004). *Doing Research in the Real World*. London: Sage Publications Ltd.
- Health and Social Care Act 2001*. London: The Stationery Office Limited.  
<http://www.opsi.gov.uk/ACTS/en2001/2001en15.htm>.
- Her Majesty's Government (2005). *Opportunity Age: Meeting the challenges of ageing in the 21<sup>st</sup> Century*. London: Department for Work and Pensions.
- Leamy, M. & Clough, R (2001). Older People as Researchers: their role in a research project. *Education and Ageing*, 16 (3): 279-287.
- Leamy, M. & Clough, R. (2006). *How Older People Became Researchers: Training, Guidance and Practice in Action*. York: Joseph Rowntree Foundation.  
<http://www.jrf.org.uk/bookshop/eBooks/9781859354353.pdf>.
- Lister, R. (1998). In from the margins: citizenship, inclusion and exclusion. In M. Barry & C. Hallett (Eds.), pp26-39. Lyme Regis: Russell House Publishing.
- Means, R., Richards, S. & Smith, R. (2003). *Community Care: Policy and Practice*, 3<sup>rd</sup> edition. Basingstoke: Macmillan.
- National Open College Network (2005). *The National Credit Framework*. <http://www.nocn.org.uk> - accessed 29 August, 2006.
- National Health Service Reform and Health Care Professions Act 2002*. London: The Stationery Office Limited.  
<http://www.opsi.gov.uk/acts/acts2002/20020017.htm>.
- NIACE (2002). *Older people and learning - some key statistics, Briefing Sheet* 32.  
[http://www.niace.org.uk/information/Briefing\\_sheets/Older\\_Learners\\_Stats.htm](http://www.niace.org.uk/information/Briefing_sheets/Older_Learners_Stats.htm), accessed 29 August, 2006.
- NIACE (2005). *Fairer Funding For Adult Learning*.  
[www.niace.org.uk/fairerfunding](http://www.niace.org.uk/fairerfunding), accessed 29 August, 2006.
- Nolan, M., Davies, S., & Grant, G. (Eds.) (2001). *Working with Older*

- People and their Families*, Buckingham: Open University Press.
- Office of the Deputy Prime Minister (2006). *A Sure Start to Later Life: Ending Inequalities for older People*. London: ODPM.
- Riseborough, M. & Sribjlanin, A. (2000). *Overlooked and Excluded? Older People and Regeneration*. London: Age Concern.
- Thomas, M. & Pierson, J. (1995). *Dictionary of Social Work*. London: Collins Educational.
- Thompson, N. (1998). Social Work with Adults. In R. Adams, L. Dominelli, & M. Payne (Eds.), *Social Work: Themes, Issues and Critical Debates*. Basingstoke: Palgrave.
- Titchen, A. & Binnie, A. (1993). Research partnerships: collaborative action research in nursing. *Journal of Advanced Nursing*, 18 (6): 858-865.
- Wilkinson, G. & Capener, S. (1997). In praise of older learners. *Adults Learning*, 8 (6): 158-160.
- Withnall, A. (2002). Three decades of educational gerontology: achievements and challenges. *Education and Ageing*, 17 (1): 87-102.

### Notes on contributor

Lee-Anne Fenge is a member of the Social Care and Research Group in the Institute of Community and Health and Community Studies at the University of Bournemouth. She is currently working on the project *Practising partnership and inclusion - a participative enquiry with older gay men and lesbians*, which is funded by the Community Fund.

### Address for correspondence

Lee-Ann Fenge  
 Institute of Health and Community  
 Studies  
 S706  
 Studland House  
 Christchurch Road  
 Bournemouth BH1 3NA  
 Email: lfenge@bournemouth.ac.uk