

Commission
on the Voluntary
Sector & Ageing




AGE OF OPPORTUNITY


Putting the ageing society of tomorrow
on the agenda of the voluntary sector today

April 2014



The Commission on the Voluntary Sector & Ageing was established by NPC to put ageing on the agenda for the voluntary sector. NPC is working in partnership with ILC-UK and both provide secretariat support to the Commission.

NPC  NPC is a charity think tank and consultancy which occupies a unique position at the nexus between charities and funders, helping them to achieve the greatest impact. We are driven by the values and mission of the charity sector, to which we bring the rigour, clarity and analysis needed to better achieve the outcomes we all seek. We also share the motivations and passion of funders, to which we bring our expertise, experience and track record of success. By helping them use their resources more effectively, by inspiring through new thinking and by prioritising impact, we are transforming the sector. www.thinkNPC.org

ILC  The ILC-UK is an independent, research-led think tank dedicated to addressing issues of longevity, ageing and demographic change. The ILC-UK was established in 2000 to explore and address the new longevity revolution and its impact on life-course and society. It provides the visionary approach needed for individual and societal planning to ensure a progressive, economically viable and socially inclusive tomorrow for all. www.ilcuk.org.uk

We are grateful for the support of our funders. The Commission has been funded in its first year by the National Lottery through the Big Lottery Fund and by Prudential.

This paper is based on our full report which outlines the size and state of the voluntary sector and includes key figures and data on England's ageing population. Full references are included and you can download it from our website: www.voluntarysectorageing.org

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Setting a challenge

This paper provides context on the voluntary sector and the country's ageing population, and then covers a number of areas we think are of particular interest to the sector: relations between the different sectors, health and well-being, technology, volunteering and trusteeship, employment and fundraising. For each area we set the scene with some key stats and then put forward extreme scenarios of the future based on the trends we have identified.

This paper issues a challenge to the voluntary sector to engage with the debate and start preparing for the changes ahead. We will be consulting further with the sector over the next eight months to encourage this forward thinking and will identify innovative projects and best practice that can be shared to encourage learning and action.

A WORD FROM THE CHAIR



Lynne Berry OBE, Chair of
the Commission on the
Voluntary Sector & Ageing

I care passionately about the voluntary sector and I care too about creating a society fit for us all to live in. Over the next 20 years society will change dramatically and the voluntary sector will need to change with it. The big demographic shifts implicit in an ageing population, and one that is more diverse and globally interconnected as well, will affect all charities—whatever their mission.

*The big demographic shifts implicit
in an ageing society... will affect all charities*

The voluntary sector is proud of its capacity to challenge policymakers to react to the world as it changes. This is our challenge to the sector to begin to change itself. Because in order to remain relevant and to have the time, skills and money needed to continue its work in the future, the voluntary sector will need to forge new relationships with the public and private sectors, with philanthropists and funders, and with volunteers and the public.

As Chair of this Commission, I want organisations to start thinking hard about the implications of an ageing population—what resources they will need and how the sector as a whole can react.

This paper—deliberately provocative in places—and the further materials we've developed, will help the voluntary sector engage with these issues so they can act now to take advantage of the huge opportunities a changing demography will create.

*Act now to take advantage of the huge
opportunities a changing demography
will create*

This is our future and we want to shape it together—so please do get in touch with your comments, ideas and feedback.

A handwritten signature in dark ink that reads "Lynne Berry". The signature is fluid and cursive, with a large loop at the end.

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INTRODUCTION

The country is experiencing a huge demographic shift. By 2033 nearly a quarter of the population will be over 65 years old, tipping the balance between the number of working people and those receiving pensions as birth rates decline. The scale and nature of such changes will present both a significant challenge and an opportunity for charities, funders, social enterprises and other voluntary organisations—and not just for those whose main focus is on working with older people.

By 2033 nearly a quarter of the population will be over 65 years old

NPC, in partnership with ILC-UK, established the Commission on the Voluntary Sector & Ageing to put these profound demographic changes firmly on the agenda. Focusing on England, the Commission provides long-term and strategic thinking about how the sector can best prepare for and adapt to an ageing society over the next 20 years.

To do this, we started with a series of questions: in the context of an ageing society, what will the voluntary sector look like in 20 years' time? How will change impact the beneficiaries we work with? What will it mean for our workforce, and our volunteering and fundraising strategies? And how will these changes affect the voluntary sector itself?

What will the voluntary sector look like in 20 years' time?

More importantly, how can we adapt to and take advantage of this demographic shift? And how can the voluntary sector help to shape the changes to produce a future that we all really want to live in.

We need a chance to debate these big questions, to seize the opportunities, to think in the long-term and to experiment with different solutions and approaches.

Demographic change



The percentage of the population aged **over 65** is increasing.

Our population is growing: by 2033 the English population is projected to grow by over seven million to reach 60.1 million. In 20 years from now, the age structure will be different too: 23% of the population will be over 65, compared to 16% in 2010. The proportion under the age of 16 will fall and the country will be increasing ethnically diverse—a fifth could be from a background other than white by 2023, against 8% in 2001.

We are living through a period of extraordinary change

On top of this we are living through a period of extraordinary change driven by shifting global economic and political forces, a digital revolution progressing at an unheard-of rate, and a genuine reframing of the relationship between consumers and providers. If we were unhappy with a service 20 years ago, we might have written to the company. Today, we tweet the CEO of the provider—phone company, local council or charity—and expect an immediate response.

The combination of population change and technological and societal upheaval could have key impacts both on individual charities and across the sector in coming years. We need to start planning our response now.

Optimism not fear

65
is the new
50

An ageing society is too often perceived as a burden, a time bomb even, and yet we should look at the opportunities that this older, mostly healthy, population brings. We should not see new generations hitting 65 in the same light as those in the past. In fact, large numbers of people over 65 are not only healthy and independent, but are also actively contributing to society in a variety of ways—they are certainly not a 'problem'. In terms of lifestyle and expectations, '65 really is the new 50'.

Much of the debate about ageing focuses on health, social care and pensions. These are of course important issues and will have an impact on the voluntary sector, particularly in relation to the work it undertakes. However, as others are already considering these subjects in detail we have deliberately not put them at the centre of our discussions. As this Commission develops its work, we expect to pick up particular recommendations for the sector from these areas through initiatives such as The King's Fund Commission on the Future of Health and Social Care, the Ready For Ageing Alliance and Lord Filkin's Centre for Ageing Better.

A new generation

More than a million people aged over 65 are either in work or looking for work. The value of older people's volunteering in the UK was estimated at more than £10bn in 2010, and is expected to be worth over £15bn by 2020. The annual value of childcare provided by grandparents in the UK was estimated at £2.7bn in 2010, and could rise to £4.5bn each year by 2030. Grandparents are also generous donors to their grandchildren: a fifth of grandparents in England aged over 50 gave money to grandchildren, totaling over £647m in 2010. Given the financial difficulties that the recession has caused many families, and the relative prosperity of the baby boomer generation (those born in the post-war era, 1945-1964), we can anticipate that this is likely to increase.

Older people's volunteering in the UK is expected to be worth over £15bn by 2020

Much of the debate, and fear, surrounding an ageing population focuses on care costs—yet only 3% of people aged over 65 actually live in residential care. Moreover, the generation that invented the teenager and was at the vanguard of so much change and rebellion is now nudging retirement—these baby boomers will be a very different group of older people from those we have seen before. Many are better educated, and many will be healthier and wealthier than earlier cohorts. Their health is supported by the availability of relatively cheap drugs, such as statins, that manage what would otherwise be life-threatening illnesses.

Of course, there will remain a sizable minority within future generations who have not benefitted from improvements in health or wealth and will need support. But regardless, we can expect the future over-65s to have very different moral norms, attitudes and expectations about the quality of their life and leisure time in older age. For the first time, illicit drug use among older people is set to rise as the baby boomer generation matures.

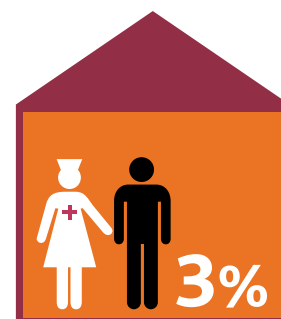
2010



2020



Older people's volunteering worth £10bn in 2010 and expected to be worth over £15bn by 2020.

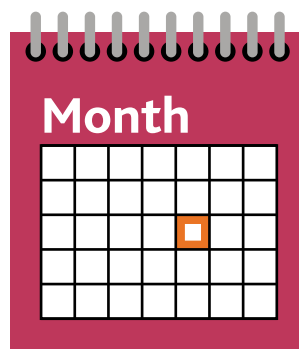


Only 3% of people aged over 65 live in **residential care**.

THE SECTOR TODAY

180,000

registered charities in England and Wales.



12.6 million in England
volunteer at least monthly.



£8.4bn of voluntary sector
income from **individuals
donating**—nearly 22% of
the total.

23m

people **volunteering** at least once a year.

732,000

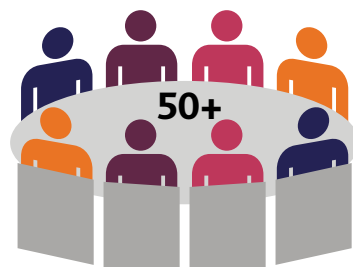
people **employed** by charities.



£1.7bn of voluntary sector
income from **legacies**—over
4% of the total.



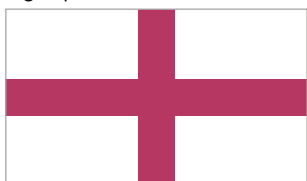
25% of charities receive **funding
from the state.**



66% of charity **trustees** in
England and Wales are aged
50 and over.

THE POPULATION TOMORROW

English pensioners



=

Ireland



Norway



Iceland



Lithuania

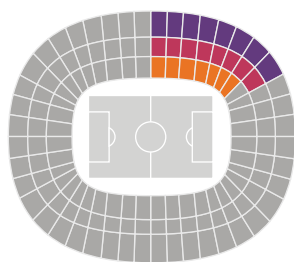


By 2033 the number of people in England of **state pension age** will have increased to over **13 million**—equivalent to the combined populations of Ireland, Norway, Iceland and Lithuania.



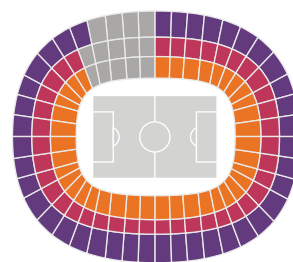
In 2035 **life expectancy** is expected to reach nearly 84 for men and 87 for women.

2012



The number of people in the UK **aged over 100** in 2012 would have only filled 1/7th of Wembley Stadium.

2033



By 2033 this is projected to increase five-fold—almost filling Wembley Stadium.



The pensioners of tomorrow will be digitally savvy—54% of adults aged 54 to 65 now **own a smartphone**.

2013



2033



The proportion of older people who come from a **minority or ethnic background** is expected to more than double by 2033.

PREDICTING THE FUTURE

Change happens faster than we think, and rarely how we expect it to

Steve Jobs, interviewed in Rolling Stone magazine back in 1994, might not yet have created the iPod or iPhone, but he was thinking about the potentially enormous impact of the internet on people's lives: *'Finally, now, the wave is cresting on the general computer user... Putting the Internet into people's houses is going to be really what the information superhighway is all about'*. 20 years on we can see he was right, but even now a desktop PC seems old-fashioned as we watch the growth of mobile and tablet technology, and await wearable devices that will soon be the norm.

Back in 1994, we may not have thought too much about the year 2014—apart from maybe secretly hoping for jetpacks and household robots. And even if we did, few would have foreseen the increase in digital communications and the constant connectivity of today. But if we cast our minds back we may remember that in that year Nelson Mandela was inaugurated as the first black South African president, the last Russian troops left Germany, and Yasser Arafat, Shimon Peres and Yitzhak Rabin won the Nobel Peace Prize. It was clearly a period of dynamic change.

In 1996, the Deakin Commission predicted the future of the voluntary sector, but not everything has played out as expected. We might have anticipated the end of statutory grants, but we may not have expected such a rise in public service delivery by the private and voluntary sectors. We thought the Compact agreement would have an impact on relations between voluntary organisations and the national and local state, but in reality many local authorities and government departments have been reluctant to engage with it.

When we look 20 years ahead, our predictions could be equally misplaced. But this misses the point: value lies in the process itself—in considering what we would like to see and using the knowledge we have as an opportunity to shape and develop a better future.

A brave new world

The demographic changes of the future are themselves fairly certain. We know a lot about the people who will be pensioners in 20 years' time and this is unlikely to change—unless we see more large-scale immigration (doubtful in the current political climate) or a mass pandemic that hits one section of the population disproportionately.

We know that the state pension age is set to increase to 67 (and a future government could increase it further and faster or—unlikely as it sounds now—reverse this) and that many people may need, and want, to remain in the workplace beyond that age. Overall, we will see an older population that is healthier and wealthier than it is today. However as policies change and services are cut we will also see an increase in people unable to work yet too young to claim a pension, and of people unlikely to reach retirement age in good health.

Others will seek a different career for the final years of their working lives: manual workers may be of insufficient health to continue working in the same role into their late 60s, for example. Will the voluntary sector be able to play a role in providing new employment, or in facilitating the support and placement of older workers looking for work?

We are likely to see a world where technology is ubiquitous and we are surrounded by a constant flow of data—generated when we buy news (trading data about our views and interests), seek medical assistance (a flow of data about our own personal health and our genetic profile), and shop

(trading data about our budget, preferences and the items we need). In such a world, a mobile phone may be part of our clothing or even embedded in our bodies. Artificial intelligence could provide childcare for our grandchildren and companionship for our ageing parents; our bin could alert the collection company when it is full; and our fridge could automatically order more food as it empties.

We can reasonably expect many more changes besides: an increase in the number of young people acting as carers for their parents or grandparents; a wider ethnic diversity in our older people, with new and varied needs; and an increase of women with professional careers and further changes in family structure.

So how does the voluntary sector find its role in this brave new world? How will the sector maintain its unique strengths, its voice and its role in supporting the vulnerable, and also respond to a fast-changing environment? How can it make the emerging future a better one? What do we need to be thinking and doing now to prepare?

The world in 20 years' time

To create our visions of the future, we've looked back at the past to help us challenge the assumptions on which our world view and our values are based. The voluntary sector can be vulnerable when it takes current working assumptions for granted: we often expect they will remain robust over time, when they can in fact be eroded by emerging changes. Our future is dependent on developments in technology and various conflicts and opportunities that we cannot always predict.

To combat this we have developed extreme scenarios to illustrate what we could see in 20 years' time. The reality is probably—hopefully—somewhere in the middle. However, these scenarios serve as a wake-up call to individual organisations and the sector as a whole to consider what we need to do now to ensure we grasp the opportunities to shape the future we want to see. As the Early Action Taskforce's upcoming report *Looking Forward to Later Life* proclaims: *'We want to seize the opportunities later life offers, and successfully navigate its challenges. New aims, new institutions, new structures, new attitudes to age and a new ambition'*.

Future-proofing

To ensure the future is as positive as possible, we not only need to understand the opportunities and challenges that lie ahead, but also take control to shape the changes we want to see. People living longer, healthier lives is a great opportunity for our society and one that the sector needs to take advantage of. Not only that, the sector has a role to play in supporting others to benefit too and helping people future-proof their lives. We all want England to be a great place to live in, to grow up in and to grow old in—let us act now to secure that brighter future.

1. THE SECTOR'S POSITION IN SOCIETY

Key stats

Statutory grants to the voluntary sector have decreased over ten years—from £4.5bn to £3bn.

Government contracts to the voluntary sector have increased over ten years—from £4.7bn to £11.2bn.

Of the services they buy in, central government procures 5.6% and local government 9% from the voluntary sector.

25% of charities receive funding from the state.

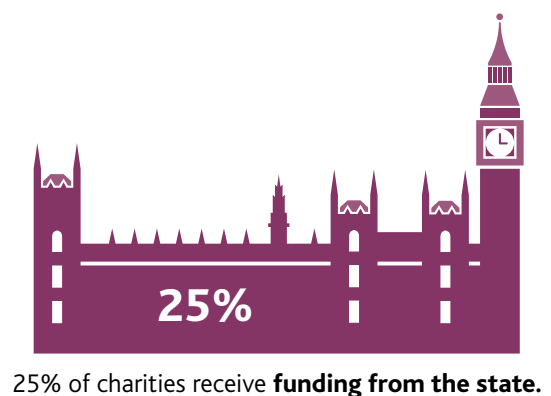
Over 27,000 charities state 'the prevention or relief of poverty' as one of their charitable objectives.

Average incomes in the UK have fallen—in 2012, around five million people were paid below the living wage.

The number of children living in poverty is expected to increase to around 4.2 million by 2020.

The relationship of the voluntary sector with the public and private sectors and indeed society as a whole has changed fundamentally in the past few decades, and we are likely to see further dramatic shifts in these relationships.

We present two extreme potential scenarios of what this could mean for the voluntary sector 20 years into the future.



Future scenario one: a flourishing voluntary sector

The state has become much smaller, and local and national government has been redefined, with the divisions between voluntary, public and state sectors less clear than they were at the turn of the millennium. This smaller state has made room for the voluntary sector to lead in the design and delivery of quality personalised support for beneficiaries. This newly established role has enabled the sector to mobilise the skills and experience of the many older workers coming into the sector to develop new ideas and innovative practices and partnerships. New ways of working with local people have been established to support and develop thriving communities.

The voluntary sector is now identified as the provider best suited to reaching vulnerable people

The voluntary sector has demonstrated its impact and competes effectively with the private sector on cost, professionalism and outcomes. The sector is collaborative and vibrant, retaining its ethos, diversity and range of services—and is respected as an effective conduit for the views and interests of citizens.

The sector serves as a provider—delivering joined-up services, on its own terms and with appropriate funding. Where charities deliver as sub-contractors to the private sector, they do so with full cost recovery and using risk-sharing arrangements that are equitable and manageable. The voluntary sector has continued to provide support to disadvantaged citizens in a systematic way to solve social problems—particularly through strengthened voice and advocacy.

The voluntary sector is now identified as the provider best suited to reaching vulnerable people. When services work, the sector mobilises the support of corporates to fund their scaling-up, supported by government. Social investment is also thriving, giving charities a third big stream of income.

The sector has continued to play a role in the relief of poverty—but as governments have stepped back from further welfare cuts, the role of charities and services such as food banks is one of responding to emergencies, rather than as a wholesale provider of welfare in place of the state.

The voluntary sector has redefined its role: small charities are now innovative and nimble; bigger ones reach ever larger numbers of people and make good use of economies of scale.

Despite restrictions on lobbying by organisations including charities, in the past two decades the sector has maintained its role in advocacy and campaigning, and become the voice of the marginalised and vulnerable.

Future scenario two: takeover by the corporate sector

As the state has rolled back, the corporate sector has rolled in. Already in 2014 there were concerns about the proportion of outsourced public services already being run by private companies. Now private companies have been commissioned by the state to undertake the majority of health services and the voluntary sector has been pushed out—causing many organisations to fold and the loss of the unique focus and abilities that charities previously contributed.

The sector has lost much of its voice and therefore its role in advocacy and campaigning

Competition among sector organisations for contracts is intense and many smaller charities have fallen by the wayside—while large national 'charity' businesses resemble quasi-organisations of the state, delivering services at a one-step distance from government. Small, local and community organisations have lost out and are struggling to maintain their existence; their roles have been replaced in some cases by self-organised groups of citizens.

The sector has lost much of its voice and therefore its role in advocacy and campaigning. Individuals and groups of like-minded people have taken this over and now occupy the space previously occupied by campaigning charities. Lobbying, once a key part of many charities' activities, has long been outlawed and while self-organised groups of citizens have taken up the mantle on many issues, it is an area where charities no longer operate.

Charities have had to prove their impact, improve their transparency and deliver genuine accountability to their supporters in order to survive—only those that did have managed to compete with social enterprises and locally run pop-up organisations, which have now taken over much of the civic space previously occupied by charities. While perhaps good for productivity in the sector, this has been less positive for the richness of civil society.

The voluntary sector has been unable to substantively pick up the pieces

After decades of squeeze on working-age benefits, governments—fearful of the size and turnout of the older cohorts of voters—have retained their

promise of a 'triple lock' on pensions (ensuring the state pension goes up by whichever is higher: inflation, wages or 2.5%). Generations of older people have continued, in the main, to be better protected from the impacts of recession and austerity than working-age people. Younger people—hit by wage restraint and increasing prices, cut out of the housing market and heavily indebted—have become resentful of the protected, more settled older generation.

In some areas, chaos reigns. The impacts of climate change have worsened: floods, droughts and periods of extreme weather have pushed infrastructure to breaking point. Public finances cannot improve in the economic stagnation and although the state has shrunk, the voluntary sector has been unable to substantively pick up the pieces. There is widespread civil unrest and disintegration. Inter-generational conflict is rising between an older, engaged and more prosperous generation and a growing, younger underclass. A number of crisis services such as food banks have seen a huge increase in the past few decades. The reduction of state services has exposed huge areas where people have been left to fend for themselves or rely on charity.

Discussion points

What three things does your organisation need to do to mitigate against or benefit from these scenarios?

How can the sector best take advantage of new structures and new relationships?

How can your organisation find its feet in such a changing landscape?

Is it time for a new definition of charity? Does the wide range of organisations and structures that it encompasses still work and resonate with the public?

How can we best encourage collaboration both within the voluntary sector and with other sectors?

2. HEALTH AND WELL-BEING

Key stats

15 million people in England were identified as having a long-term condition in 2011—hypertension, depression and asthma are most common.

In 2012 life expectancy was highest in the South East and lowest in the North West and North East of England.

The principal cause of death in England and Wales in 2012 was cancer, followed by heart disease and stroke—however incidences of these diseases are falling.

There are around 800,000 people with dementia in the UK and 1/4 of hospital beds are occupied by people with dementia.

We are currently seeing declining mortality rates with longer life expectancy and improvements in health brought about by medical advances and better treatment of long-term conditions. However, there is much diversity in terms of life expectancy across the country.

We present two extreme potential scenarios of what this could mean for the voluntary sector 20 years into the future.



In 2012 **life expectancy** was highest in the South East and lowest in the North West and North East of England.

15m

with **long-term conditions**.

800,000

people with **dementia** in the UK.

Future scenario one: a healthy sector

Following many decades of almost constant reorganisation, the past two decades have seen stability in the organisation of health and social care in England. Preventative health measures have pushed back the age of morbidity, and the population is now getting both older and healthier. Health-related aspects of the voluntary sector have been built up and structured in close collaboration with public services, and the 'supply chain' of services has been coordinated centrally in order to look holistically at individuals' needs, rather than singling out issues such as disability or diabetes.

The voluntary sector now takes lead responsibility for work related to the prevention of disease—including both physical and mental illnesses—while the state is responsible for treatment once a person has a disease. Charities then continue to play a supportive role to the patient while the treatment is on-going.

The voluntary sector now takes lead responsibility for work related to the prevention of disease

An umbrella organisation coordinates all health-related work in order to address the systemic challenges related to minimising the state's services and maximising charities' roles. This umbrella body coordinates the training and consistent support of volunteers—though the training itself may happen at other organisations—and also provides a strong advocacy voice in representing service users.

Life-long learning is the watchword, with the principle of 'an active mind leads to a healthy body' embraced by the interdependent way of working. GPs are administering the proverbial 'learning pill' alongside traditional medicine, and the voluntary sector is leading the delivery of highly effective learning therapy which is keeping secondary healthcare costs down.

The sector promotes volunteering as a service in itself

The sector promotes volunteering as a service in itself, recognising the health benefits of helping others and being socially active. Consequently, there is less differentiation between those that are delivering services and those using them; in fact, people may do both simultaneously.

The sector has embraced a flexibility that allows it to adopt and adapt to the new opportunities offered by technology. There is less hesitation about moving services online or enabling people to use their own devices to monitor their health and interact online with health and service staff, volunteers and peers. Technology is welcomed as a tool to make services more personalised, and charities, with the help of volunteers, provide bespoke services to each individual.

The movements towards both localism and personalisation, begun in the 2000s, are working well. The population as a whole, as well as the older generation, is benefiting from a leaner, more tailored health and social care service.

Future scenario two: uncoordinated and fragmented services

Health inequality has increased. Localism has resulted in appalling health inequalities and personalisation has been abandoned—resulting in inadequate funding for the care of too many people in need. For those who can afford it, a range of lifestyle and technological interventions allow them to pre-empt, prevent and treat many diseases before they become apparent. For those who cannot afford it, disability and illness—cancers, heart disease, diabetes—are prevalent and there is an increasing inequality in healthy lifespan between rich and poor and the north and south of the country. The voluntary sector covers bits and pieces where the state has reduced services, but there are now large gaps—geographically and issue-wise—in the provision of health services.

For those who can afford it, a range of technological interventions allow them to pre-empt, prevent and treat many diseases

Public service workers feel that charities are competitors, often taking over the 'softer' parts of their jobs and leaving the bulk of the complex and hard work to them—and sometimes even taking their jobs entirely by being the cheaper option.

Charities have been forced to keep cutting their prices for services. They lack the resources to engage in evaluations or reviews to identify and subsequently address more strategic issues: their work is driven by the most urgent needs. Successful approaches are not shared or scaled up, which results in major differences in the quality of health services for different groups of service users.

Private companies, commissioned by the state, now deliver most health services and the voluntary sector has been pushed out. Many charities failed to take advantage of new technology, and the new behaviours that these technologies created, and so missed out on opportunities to reach more people. In contrast, other charities relied too extensively on technology and consequently increased the exclusion of the groups of people who are either not digitally literate or do not have access to technologies. This has also led in some cases to a decline in quality as services moved online.

Private companies, commissioned by the state, now deliver most health services

Many charities failed to understand or react in time to the fact that social activity and life-long learning is crucial for the mental and physical health of the growing number of older people. They also failed to recognise that the voluntary sector is central to providing exactly these services through a diverse range of preventative activities, including volunteering roles tailored to older people. This resulted in large groups of older people feeling isolated and being more vulnerable, particularly in areas of deprivation where volunteering levels are typically low. Worse, some charities did recognise how they could help in this area, especially in preventative work, but failed to find funding for services not prioritised either by government or by private funders.

Discussion points

What three things does your organisation need to do to mitigate against or benefit from these scenarios?

Does your organisation have the data to show the impact of your services and its value for money?

How can your the sector support and encourage innovation and risk-taking?

How can your organisation ensure older people are included and supported?

How can the sector help make this country a great one to grow old in?

3. TECHNOLOGY AND DATA

Key stats

90% of adults aged 35 to 44 have the internet at home; this falls to 26% among over-75s.

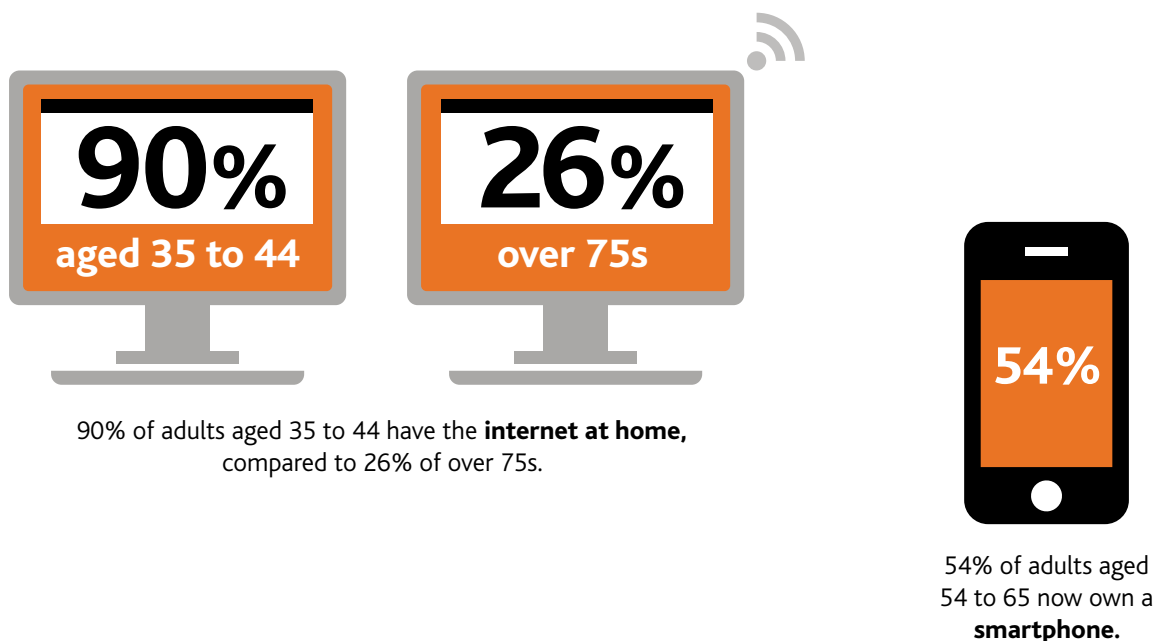
The over-65s use the internet mainly to book travel, read the news and use online banking.

Only 11% of over-65s have used online social networking sites compared to 93% of 16-24 year olds.

54% of adults aged 54 to 65 now own a smartphone.

We know that technology will continue to develop and influence the way we live and that the next generation of older people will be the most digitally savvy to date. But will the voluntary sector be able to adapt?

We present two extreme potential scenarios of what the use of data and new technologies could mean for the voluntary sector 20 years into the future.



Future scenario one: mobilising the constant flow of data

The constant flow of data enables more effective responses by the sector. The sharing of data, now commonplace, has increasingly helped charities to diagnose and predict likely outcomes. A homeless person coming into a shelter now, for example, is supported by a worker armed with the likely impacts of the various possible interventions, who is then able to make a fully informed decision on the best course of action.

Charities that use data effectively to understand their beneficiaries have fared better and retained contracts. The majority of the older population is now online, and is leading the way as consumers of technology. Most service delivery has moved to Skype (as it was known 20 years ago) and other online platforms—very little is now delivered in person. Indeed, new technologies have revolutionised the delivery of many services and hence the lifestyles of the population. New artificial intelligence robots are now supporting and monitoring the needs of older and disabled people, and the roll-out of 3D printing has revolutionised healthcare—with new joints and organs printed to order for those who can afford them.

Most service delivery has moved to online platforms

The constant access to information has changed our daily interactions and provided opportunities as well as huge challenges to the sector in how to handle data. The growth in the amount and crucially, the accessibility, of data through new technologies—from charities and government alike—has enabled charities' activities and impact to be grasped and assessed far more easily than previously.

Technology has also allowed people to volunteer more easily: roles and opportunities are now not only more widely shared, but many can also be done online, either regularly or through short bursts of micro-volunteering. Crucially, volunteering is now tailored to suit the volunteer, and as a result individuals dedicate more time to the role.

Technology has also enabled people to feel more involved in international as well as local issues. This has led to a change in the structure of many UK voluntary organisations, which are now fundraising and even providing services overseas.

Visibility and transparency have increased and experiences are now shared more easily. New platforms have enabled volunteering and giving on an instant basis—LinkedIn (as it was known 20 years ago) has become the largest volunteering platform while Facebook has become the biggest platform for giving. Charities have had to respond to new patterns of giving as users increasingly expect something more in return.

Beneficiaries of charity services are also increasingly demanding as the digital environment means they are used to getting what they want or need almost instantly: charities have had to adapt to this sort of personalisation and increase their speed of response in order to survive.

Technology has become so pervasive that we cease to notice its existence. People learn quickly and adapt to managing information to get the best out of it—older generations, with more time to spare, are increasingly the first adopters.

Future scenario two: sector swamped by data

Beneficiaries have taken a much more proactive and customer-faced role in their interactions with charities. Online TripAdvisor-style reviews of services have become the norm—leading, generally, to an improvement in the quality of provision. It has been a challenge for charities to engage, manage and deal with this constant flow of feedback, as well as the subsequent privacy and data-ownership issues.

Online TripAdvisor-style reviews of services have become the norm

As the population ages, fewer people are digitally excluded—but those who are, for reasons of age, infirmity or poverty, have become increasingly isolated as information and services move online. This has created a new excluded group, not reached even by charities as most have moved their provision online. A number of the oldest generations in particular have failed to engage with the digital revolution, creating a challenge to both state and voluntary sectors in how to address their needs.

Voluntary organisations, particularly smaller charities, have begun to drown in data, swamped by the amount they are now collecting and/or can access from state sources. Some people, particularly the older generation less familiar with technology, have found themselves overwhelmed by information, unable to differentiate between good and bad, truth and fiction, and what is useful and what is not.

Only large charities have been fully able to take advantage of the benefits of new technology

Only large charities have been fully able to take advantage of the benefits of new technology; smaller charities have struggled to fundraise in the changing climate. Those charities which were slow to make use of their own or sector data lost out, and some even ceased to fulfil their charitable purposes and folded.

Many charities worry that sharing data has led to a loss of competitive advantage, and so transparency is no longer a goal to which they wish to aspire. However, many others simply failed to take advantage of new technology, and the new kinds of behaviours that this technology created, and so missed out on opportunities to reach more people.

With the increasing importance and ease of shared experiences, some charities—unable to fulfil donor or volunteer expectations in this way—lost out. Some models of charity provision and support just become so old and dated that the charities could no longer survive.

Discussion points

What three things does your organisation need to do to mitigate against or benefit from these scenarios?

Should your organisation be considering moving the bulk of its service delivery online?

Can the sector compete or partner with others (private and public sector) for cost, professionalism and outcomes?

How can your organisation ensure that it communicates effectively in an increasingly fast-moving, digital environment?

How can the sector share data in a collaborative and non-competitive manner?

4. CONTRIBUTIONS OF TIME

Key stats

The value that volunteers bring to the sector is estimated to be worth over £23bn.

45% of adults in England volunteer annually which equates to 23 million adults in the UK volunteering at least once a year—12.6 million volunteer at least monthly.

Older people are some of the most regular volunteers—31% of 65-74 year olds and 21% of over-75s volunteer monthly.

The average age of trustees in England and Wales is 57; two-thirds are aged 50 and over.

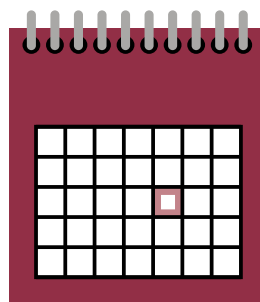
In terms of socio-economic status, those from the wealthier groups are also the most regular volunteers: 32% from the AB category; 26% for C1; 22% for C2; and 23% for DE.

The contribution of older volunteers to the sector is critical—both in supporting and delivering services and in governance as trustees.

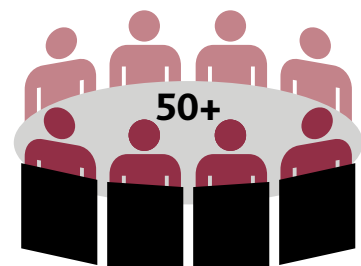
We present two extreme potential scenarios of what demographic changes could mean for contributions of time to the voluntary sector 20 years into the future.



The **value that volunteers** bring is estimated to be worth over £23bn.



12.6 million in England
volunteer at least monthly.



66% of **charity trustees** in England and Wales are aged 50 and over.

Future scenario one: enthusiastic engagement

Volunteering rates have remained high. As the baby boomer generation retired, still on defined-benefit pensions, the pool of volunteers available to the sector has grown. This group has the time and enthusiasm to volunteer regularly, gaining skills and experience over a number of years to enable them to carry out services with little direction from paid charity staff.

Following the established trend of older people being the least likely group to stop volunteering once they start, this group has also remained in volunteering for long periods. And, despite the rise in retirement age (to 67 for both sexes in 2020), the number engaged in volunteering has continued to increase as many people live longer, healthier lives. The growing professionalisation of volunteering has also sat well with the baby boomer generation, enabling them to unwind their careers and work in the sort of 'portfolio career' that volunteering, including trusteeship, can bring.

The number engaged in volunteering has continued to increase as many people live longer, healthier lives

The increasing evidence of the benefits to well-being of regular, altruistic activity has also attracted more people to volunteering. There has been a growing trend to dip in and out of events-based volunteering or to 'micro-volunteer': this lack of regular responsibility has increased uptake. This is especially true among the young, who were the first generation to participate in new models of formal volunteering, such as the three-week National Citizens' Service introduced in the 2010s and later rolled out to one year.

Corporate and social responsibility (CSR) has continued to grow in importance in companies, with some of them using their CSR record to attract new graduates. This in turn has increased the pool of volunteers, including many in their twenties and thirties.

As the trend towards under-employment continued, people have increasingly spent their spare time volunteering and have been keen to use that time to develop skills to bring into the labour market. In

the way that we saw dating agencies move from the back pages of newspapers to the mainstream online world in the early 21st century, online brokering of volunteer opportunities is now the future. LinkedIn has become the portal for all employment and volunteering interactions.

The increased life expectancy and ageing population over the past 20 years has resulted in a rise in the average age of trustees. Further, the sunlight of transparency has created a different world of effective governance in the voluntary sector, and as charities take on contracts and embrace new forms of funding, the increased complexity of the governance role has attracted more trustees from more diverse professional and cultural backgrounds.

The line between donor and beneficiary has become increasingly blurred: people now frequently give both time and money but also receive a service. Those who give expect something more in return for their time, be that skills, credits or a reciprocal service.

The line between donor and beneficiary has become increasingly blurred

Future scenario two: insufficient supply and lack of incentive

With an ageing population we are seeing a greater need to deliver certain services. Increasing numbers of the 'oldest old', who suffer a variety of conditions such as Alzheimer's and diabetes, require a much larger pool of volunteers to help deliver health and social care support and to undertake more routine volunteering tasks such as serving in the growing numbers of charity shops and offering social interactions and befriending. But it has been, and remains, hard to mobilise volunteers to support more difficult or challenging work. At the same time, as retirement ages have continued to rise, the body of volunteers—for so long reliant on older people—has diminished as this group either needs or wants to remain in paid work for longer.

It has been hard to mobilise volunteers to support more difficult or challenging work

The expectation of volunteering rates among the baby boomer generation was wildly over-estimated back in 2013 and rates have been much lower. In reality, the baby boomers have had many preoccupations in their retirement: some have had to work full-time for longer to fund their own or their partner's health and care costs; others are caring for grandchildren or travelling and enjoying their healthy years post-work.

What is more, younger people have also not volunteered in greater numbers or proportions. The trend, already seen in 2014, towards individualism has accelerated and Generation Y, born in the 1980s and 1990s, increasingly interact with technology but are demonstrably less supportive of institutions and concepts such as the NHS, welfare and community.

The shortage of trustees has continued: 20 years ago over 90% of charities had up to five trustee vacancies on their boards, and that situation has worsened over the decades. The increasing age of trustees, now heading towards mid-60s on average, has led to tensions in organisations between a much older board and a much younger workforce—each with different attitudes, values and understanding of the organisation's role and mission.

Ever-increasing levels of criticism from the government, press and public towards the running of charities has meant people are reluctant to take on the increasingly challenging role of trusteeship, which has led to crises of governance in many organisations. The increasing professionalism and technicality of the sector, with its work on public sector contracts and new forms of funding such as social finance, has also put off potential trustees. In some organisations, the current governance model has ceased to work entirely—trusteeship has become redundant due to the complexity of funding and delivery models, an increasing number of scandals and crises, and fear of litigation.

People are reluctant to take on the increasingly challenging role of trusteeship

The boundaries that previously existed between our personal and our professional lives have almost entirely blurred. There are challenges around the definition of a spokesperson, a volunteer and a beneficiary. While stimulating, this confusion is sparking debate about who the organisation exists for, and in whose interests it should operate.

Discussion points

What three things does your organisation need to do to mitigate against or benefit from these scenarios?

How can your charity make volunteering more attractive?

How can your organisation attract the 'oldest old' through to the younger generation into the sector?

How can your organisation attract a younger and wider range of volunteers into governance roles?

How can the sector manage the blurring of user, donor and volunteer in the future?

5. STAFFING THE SECTOR

Key stats

Over 700,000 people work in registered charities and two million are employed within wider civil society organisations.

40% of staff in the voluntary sector work part-time—a much higher proportion than in public or private sectors.

68% of voluntary sector staff are women (almost half of who work part-time).

Gross hourly pay within the voluntary sector in 2011 was £12.02—less than both the private (£12.60) and public (£14.20) sectors.

Between 2011 and 2013 the proportion of people aged 65 to 74 who were employed almost doubled to reach 16%.

The concept of both work and retirement is changing.

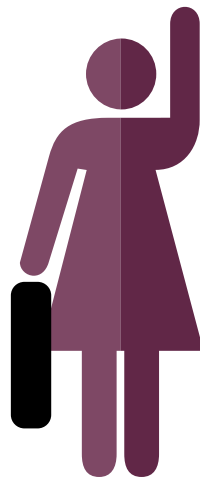
We present two extreme potential scenarios of what this could mean for the voluntary sector 20 years into the future.

732,000

people **employed** by charities.

16%

of 65 to 74 year olds **employed** in 2013.



68%

of voluntary sector staff are **women** (almost half of who work **part-time**).

Future scenario one: active and innovative age management

The state pension age for both men and women is 67, though this is due to be reviewed this year—2034. The shift to later retirement has been a more gradual adjustment for women: the state pension age undergoing an increase first from 62 in 2014 to 65 in 2019 before then equalising with the male retirement age. These changes have generally led to a large supply of workers looking to remain in employment or to find employment in later life, with a marked increase in women specifically.

The sector is the most forward thinking in terms of flexibility, and thus is the destination of choice for older workers

The sector recognised there would be increasing competition for good workers, and since it still cannot compete with other sectors on salary, it has capitalised on the fact that it is the most forward-thinking sector in terms of flexibility, and thus the destination of choice for older workers. Although across the economy many workers have continued to be under-employed (working in part-time roles when they really want full-time employment) the sector has managed to provide a wide range of part-time opportunities to those who were specifically looking for them. As many charities foresaw, 'portfolio careers' have become increasingly popular, with older workers wanting or needing to work fewer hours, but bringing all their knowledge and experience into the role.

The sector designed training programmes specifically aimed at the increased supply of older women working later in life—majoring on charities' flexibility to enhance the work-life balance. This has addressed women's demands for time to provide informal care, but also opened the way for a more gradual transition into retirement. This is increasingly important as ever greater numbers of retirees seek to remain economically active. The sector has become a leader in women's employment and has promoted more women into positions of leadership and influence, helped by increased representation of women at board level.

As far as older men are concerned, the sector's success at attracting them into the workforce has largely been due to the development of opportunities for those with challenges leading to early retirement. These have been work-related illnesses, reduction in physical capacity or simply the lack of 'traditional' jobs. Charities have benefitted enormously from these new workers' experience and skills, which has outweighed the costs of retraining.

There has also been renewed interest from younger people in working in the voluntary sector, and charities have managed this interest well, recruiting younger workers while also improving recruitment and retention of older workers. Many have developed inter-generational programmes that allow mentorships and collaborative working in teams to harness different skills from different age groups. The older group does not block the younger group's progression, with charities increasingly designing roles suited to the part-time, older workforce. For example, Teach Last—where older people retrain as teachers and give their last decade of work to schools—has recently merged with Teach First, with staff from each charity working together, in complementary roles, in schools across the country.

Inter-generational programmes that allow mentorships and collaborative working in teams to harness different skills from different age groups

The use of effective age-management strategies, innovative engagement and flexibility has enabled the sector to secure its personnel needs and raise its profile as an employer.

Future scenario two: persistence of stereotypes and outdated HR policies

Given continued austerity, successive governments have agreed to increase the state pension age further and faster than originally planned. Now at 70, the policy has meant many older workers have needed to find employment later in life.

Sadly, although the voluntary sector was for many older people the first port of call in looking for more flexible working in the approach to retirement, the sector was slow to adapt to this. Its biggest challenge in the past couple of decades has been the persistence of stereotypes and a resistance to changing policies.

The sector, like others, has not taken advantage of the extended working-life agenda

Despite the reality that many older people are well educated, healthier and living longer, many charities still see older workers as nearing a phase of life characterised by economic inactivity—assuming, in the age-based stereotypes, that older workers are less productive and declining in health, and therefore cannot contribute. The sector, like others, has not taken advantage of the extended working-life agenda, instead making assumptions that older employees are eager to retire, and thus failing to keep them fully involved in organisational activities. Worse, some charities have still to recognise changes in employment policy and have not accepted the increasing need for flexibility in work, and have therefore lost many older workers due to their responsibilities outside the workplace.

Charities have often put these losses down to age-related decline and assumed that older workers can simply be replaced by younger workers. However, the departure of older experienced staff means a loss of knowledge, skills, and expertise.

Many of the older generation's assets have developed over time, and are generally not so well established among younger staff members. By focusing on the recruitment of younger people, parts of the sector have faced severe skills shortages and mismatches between available staff and the skills needed to provide services.

There has been real polarisation between generations in some organisations as different groups compete for scarce opportunities

Conversely, in charities that did see the light and recruited older people to part-time roles, younger members of staff have sometimes felt alienated. They see older workers as blocking their careers, particularly where those older people stepped down from full-time senior roles in other sectors to the mid-tier management roles in charities. There has been real polarisation between generations in some organisations as different groups compete for scarce opportunities. The trend towards under-employment across the economy has continued with many people working part-time or on zero-hours contracts who would rather be in full-time employment. Whilst the sector has continued to offer part-time roles which are suited to many older workers, younger workers find they are increasingly competing with older workers and juggling a suite of part-time roles to stay solvent, rather than through choice.

Discussion points

What three things does your organisation need to do to mitigate against or benefit from these scenarios?

How can your organisation best support, train and develop older workers, particularly men and those new into the sector?

How can your organisation respond to the increasing pension age of your workers and the availability of potential volunteers?

How can the sector best support workers with multi-generational caring responsibilities?

How can the sector support and develop younger workers and generate effective cross-generational working and transfer of skills?

6. FUNDING THE SECTOR

Key stats

In 2011/2012, the voluntary sector's income was £38.3bn.

Nearly 22% of this income—£8.4bn—came from donations from individuals. More than half of all donations to charity are from the over-60s.

Over 4% of income—£1.7bn—came from legacies. Yet only 16% of wills include a legacy to charity.

Over 2% of this income—£0.8bn—came from corporate grants and gifts to the sector.

In 2013 there was 250% increase in donations via mobile phone.

The least well-off give more proportionally—the poorest 20% give 3.2% of their monthly income to charity, compared to the richest 20% who give just 0.9%.

Older people have tended to be more generous donors to charity, so an ageing population may provide greater individual funding to the sector. However, the next generation of older people may have greater demands on their income, in terms of their health and social care and in supporting their children and grandchildren.

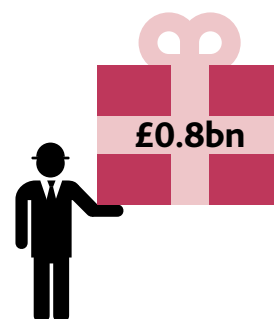
We present two extreme potential scenarios of what this could mean for the voluntary sector 20 years into the future.



£8.4bn of voluntary sector income from **individuals donating**—nearly 22% of the total.



£1.7bn of voluntary sector income from **legacies**—over 4% of the total.



£0.8bn of voluntary sector income from **corporate grants and gifts**—over 2% of the total.

Future scenario one: new perspectives on how to raise money and spend it

The trend of older people, especially women, giving more proportionately than the general population has continued and, as the population has aged, there have been increasing levels of donations from the public. The proportion of household income donated has remained in a slow but steady upwards path, relatively untouched by the recession of the late 2000s. Those over 65 years are now one of the wealthiest groups in society, and charities segment their donor populations better to specifically target such groups.

Charities segment their donor populations better to specifically target the older wealthier groups

The simplification of Gift Aid has been a boon and has encouraged charities to understand and exploit it better. This has brought particular benefits from donors who are also higher-rate taxpayers, whose numbers grew through the 2010s as the economy continued its recovery, and as baby boomers continued to retire on defined-benefit pensions.

There has been a massive transfer of wealth between generations, and the number of billionaires in the UK has grown too, almost doubling to 276 by 2022. Numbers of high net-worth individuals and family foundations have also increased. Legacies have doubled in the past 20 years, and this useful unrestricted income has enabled charities to implement more sustainable fundraising strategies. Living legacies are now finally in place in the UK too.

Increasingly, voluntary sector organisations are using the term 'investment' rather than 'donation', especially where preventative work is concerned. The sector has responded to demands for transparency, and this has encouraged donors who can more easily see where their donations will be spent.

New methods of giving, such as digital crowd-funding, have grown with the rising proportion of people online: nearly the entire population now has access to the internet. Donors now demand to know where their money has been spent. They

want to see exactly who their money is helping and in real time. This has meant a more unstable, fluid giving market: people have become unwilling to give money to organisations with £20m in reserves if they can instead watch their donations being spent immediately, such as by a city farm on feed for livestock or a service providing breakfast for children each day.

Charities are now more able to forge relationships with younger donors and this has offered great opportunities. Indeed, a culture of giving from an ever-younger age seems to have taken hold: Young Philanthropist Syndicates—20 years ago seen only in very progressive corporates—are increasingly popular, not least for the social events attached to them.

Payroll giving has finally taken off and has grown substantially from its early 2010s level of just 4%—partly due to the increased publicity of schemes and partly due to improved processes, employees can now take their schemes with them when they change jobs for example.

Corporate giving continues to grow faster than other streams of income both in cash and in kind. The new concept of shared value has become more significant, with companies increasingly working with voluntary sector organisations to enhance social good through commercial channels.

The use of effective age-management strategies, innovative engagement and flexibility has enabled the sector to secure its personnel needs and raise its profile as an employer.

Future scenario two: stagnation and decline in sector funding

Voluntary donations have not moved much since 2014, despite some success in the pre-recession years. Although there is a larger population of older people, the retiring baby boomer bulge has less disposable income than expected, having seen the tailing-off of defined-benefit pensions, increased spending on health and care, and the need to provide financial support to help younger generations. Asset-rich but cash-poor is something charities continue to hear.

Asset-rich but cash-poor

Austerity in the UK continued for longer than planned. As a consequence, the government capped tax relief on donations to boost revenue, which resulted in an overall reduction in the amount of voluntary donations to the sector.

The loss of the National Lottery, which folded nearly 15 years ago following dwindling takings and intense competition with other instant online gambling, has been a huge loss to the sector. As well as this, the decision by a number of large charitable foundations to spend out their investments over a short period of years to alleviate poverty in the initial austerity years, has meant greater demands on the funds of those that remain.

Lack of funding has meant that mergers and takeovers have been common

The lack of funding has meant that mergers and takeovers have been common. Although this has reduced costs, it has also led to the loss of the unique focus and particular expertise of smaller organisations.

Crowd-sourcing and other new technologies enabled short-lived, pop-up organisations to focus on a particular local cause by being able to demonstrate a faster impact. Such approaches have often bypassed the more established organisations, leaving them struggling to prove their working model or impact to supporters.

Regardless of the method of donation, charity fundraising has faced major challenges as people continue to feel under pressure financially either for themselves or for the younger generations of their families—legacy income has not grown.

Companies are increasingly keen on donating time rather than money, as this is now viewed as more attractive to their workforces and HR development. These in-kind services have been a useful resource for charities, but have not helped income levels.

Companies are increasingly keen on donating time rather than money

As many of the large national charities have continued to take on contracts to deliver public services, the definition of 'charity' has become blurred. The public has grown distrustful of the term 'charity' and there is a feeling of alienation in giving to an organisation that many now regard as a quasi arm of the state.

In some areas, such as health and social care, beneficiaries pay the charity directly for a service. This has led to an increasingly demanding 'consumer' of charity services, and charities have had to become more accountable to their users. Both factors have combined to lead to increasing divergence in what is defined as a 'charity'.

Discussion points

What three things does your organisation need to do to mitigate against or benefit from these scenarios?

How can your organisation take best advantage of new forms of giving and secure on-going support?

How can the sector demonstrate value for money and impact?

How can your organisation ensure it delivers value for money but also retains its individual expertise and specialisms?

How can the sector engage effectively with younger donors and with the increasing population of older donors?

TAKE ACTION!

The scenarios presented in this paper are extreme examples of what the world could look like in 20 years time, but they illustrate the unprecedented pace and scale of change we are experiencing.

Our population is growing and ageing, and the next 20 years will see a clear shift in our demographics. Consumers themselves are changing too—becoming more demanding, more sophisticated and carrying higher expectations.

How we, as individual organisations and as a sector, respond to this is crucial. We need to consider not only how we interact with future generations as beneficiaries, donors, staff and volunteers—but also think through the increasing blurring of these relationships, driven primarily by technology and data.

We hope this paper triggers conversations about the implications of an ageing society—in your organisation, in your community and across the sector.

Whether you are a charity, funder, social enterprise or donor, you need to consider how to adapt your strategies and activities to ensure you can keep fulfilling your mission in the future.

We can still take action to turn the more dystopian visions of the future into merely bad daydreams. But we need to act now. Just waiting for changes to happen could make our worst predictions come true.

Future-proof your strategy

- ▶ Talk to your board and your staff about these issues
- ▶ How will the changing population impact on your organisation?
- ▶ What do you need to do now and in the next few years to respond?

Future-proof your sector

- ▶ How will the ageing population impact on your sector?
- ▶ What actions as a sector do you need to take now and in the next few years?

Future-proof your community

- ▶ How will the ageing population impact on your local community?
- ▶ What actions can your community take to respond to these issues?

WHAT DO YOU THINK?

Have the scenarios prompted discussions in your organisation?

Are there emerging issues that you need to address?

Are you already starting to do things differently?

We want to learn from the innovative thinking and examples of good practice already out there, so share with us the action you're taking and the issues your organisation or sector is prioritising.

Get in touch

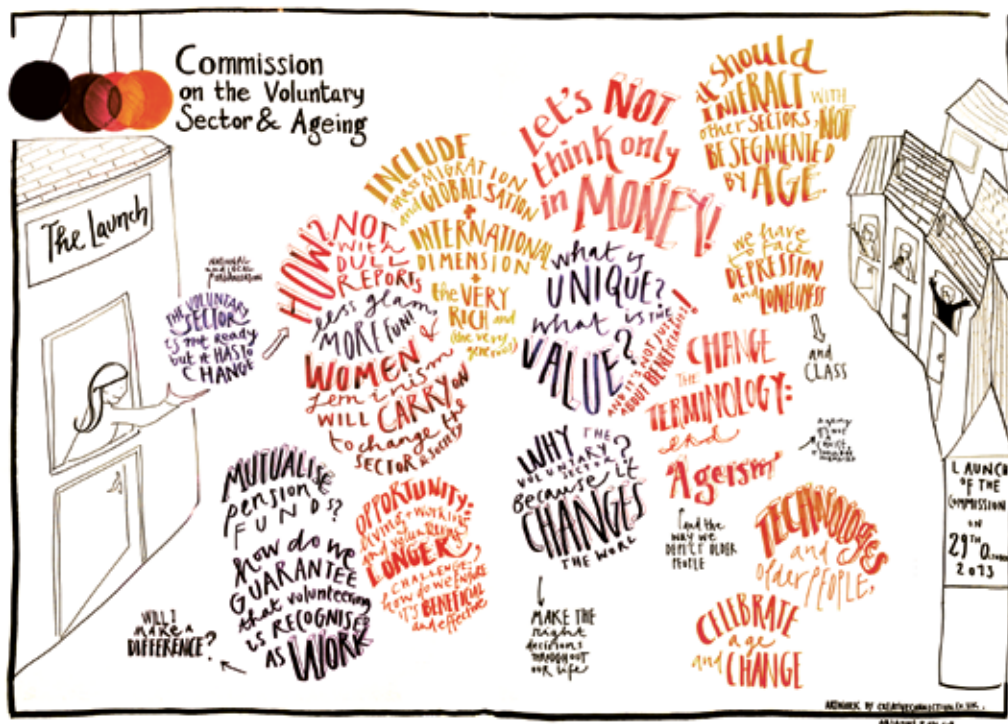
Contact Susie Rabin on susie.rabin@thinkNPC.org

or email volsecageing@thinknpc.org

Tweet @VolSecAgeing or use the hashtag #AgeOpportunity

Write to the Commission c/o NPC, 185 Park Street, London, SE1 9BL

The Commission on the Voluntary Sector & Ageing held its first meeting 29 October 2013 and the Commissioners discussed what they wanted to get out of it and their ideas to provoke different types of thinking on ageing. Key themes from this meeting were captured in the below illustration by www.creativeconnection.co.uk



The Commission on the Voluntary Sector & Ageing was established to put ageing on the agenda for the voluntary sector.

Focused on England, the Commission will provide long-term and strategic thinking about how best the sector can prepare for and adapt to an ageing society in the next 20 years.

It brings together experts from front-line charities to academia, fundraising to policymaking, and is chaired by Lynne Berry OBE.

There are three strands to the Commission's work:

- **Building an understanding of how ageing will affect the sector:** through research, analysis and futures thinking.
- **Engaging sector leaders in thinking about the implications of ageing for their organisations:** through awareness-raising, consultation and dialogue.
- **Enabling the sector to respond and adapt to ageing:** through practical recommendations, creating and piloting different approaches and sharing best practice.

www.voluntarysectorageing.org

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