

# Mobilizing the Impact of Active Ageing: volunteering and provision of informal care by older people in Estonia

National report



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**Author: Jane Matt, Praxis Center for Policy Studies**

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**Praxis Center for Policy Studies**

Tornimäe St 5  
10145 Tallinn, Estonia  
Ph +372 640 8000  
[www.praxis.ee](http://www.praxis.ee)  
[praxis@praxis.ee](mailto:praxis@praxis.ee)

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# 1. Background

The trends that Estonian society faces – the intensifying migration flows, shortening lifespan of skills and knowledge, decreasing public resources, ageing population, etc. – are all similar to the trends in other (Western) European countries (Väliskeskkond 2020...10/2012). The data reveals that in 2014 38% of the Estonian population was more than 50 years old and that by 2040 the number will grow by 10 percentage points to 48%. In addition, by 2040 almost half (46%) of the working-age population will be more than 50 years old (in 2014 the respective number was 39%). (Statistics Estonia)

The main differentia between Estonia and the Western Europe lies in the tradition and culture of engagement of different social groups into the policymaking process. Of course, the public sector in Estonia cannot ignore the need to have a dialogue with social stakeholders, but the quality of engagement varies greatly across different government agencies, i.e. it often remains formalistic and is rather informative (Praxis & Balti Uuringute Instituut 2010). Therefore, in many cases the effective patterns and channels of social and political participation are also not well established and recognised at grassroots level.

For example, there are several studies which demonstrate the low level of volunteering in Estonia (Uus *et al.* 2013, TNS Emor... 2009). According to the findings, only 31% of the population have participated in voluntary activity (consciously or unconsciously) during the past 12 months in 2013 and the participation rate in volunteering is lowest among 50–64 year old people (23% compared to 42% among 15–24 years old). What is even more important is that despite the fact that the awareness about different possibilities on where and how to contribute as a volunteer has increased, the actual (conscious) volunteering is in decline (compared to 2009). (Uus *et al.* 2013)

In addition, the results of the Active Ageing Index (AAI) and some earlier studies (Kodanikeühiskonna... 2012) demonstrate that the level of social participation is very low in the case of Estonia. Even though Estonia scores quite highly (10<sup>th</sup> place) in the context of active ageing in general among EU28 countries, it is mostly due to the high level of employment among old-aged persons. That in turn is partly the result of the one of the lowest pension incomes in the EU (27<sup>th</sup> place). When looking at four different components of the AAI, we can see that the scores are lowest when it comes to participation in society (25<sup>th</sup> place). Again, the subcomponents of the index demonstrate that older-aged people in Estonia contribute much less as volunteers (20<sup>th</sup> place) and they are politically much less active (23<sup>th</sup> place) in comparison to other EU countries. (*Ibid.*) In the study about values and attitudes that support civic activism among the Estonian population, it was found that activity is strongly related to age, especially in case of non-Estonian speaking population (Kodanikeühiskonna... 2012).

The issue of how to make older-aged people socially more active has not been widely debated in public in Estonia. Although the problem of the rapidly ageing population is quite widely acknowledged, the focus of the debate is rather on the conditions that influence emigration and the birth rate. Therefore, the question has not been that much on how to use the potential of older people, but rather how to prevent people from leaving the country and how to increase the birth rate. The Ministry of Social Affairs adopted *Aktiivsena vananemise arengukava 2013–2020* [A Plan for Active Ageing 2013–2020] in Estonia a number of years ago, but it remained without an action plan and was not therefore implemented in practice. Currently, the Ministry of Social Affairs is drafting another strategic document – *Sotsiaalse turvalisuse, kaasatuse ja võrdsete võimaluste arengukava 2016–2023*

[A Plan for Social Security, Engagement and Equal Possibilities 2016–2023]. Its scope is wider and also concentrates on gender-related inequalities besides older people, problems related to long-term care and sexual minorities. The document has not been made public yet, but according to the Ministry it has also an action plan with it so that it provides some concrete steps on how to improve the voluntary social participation of older-aged people in Estonia. The aim of the Ministry is to adopt the plan in the beginning of 2016.

The aforementioned findings indicate that the initiative of the MoPAct is very relevant in the context of the challenges that Estonian society currently faces. Changing the perspective and perceiving the older-aged people as a resource rather than a burden is definitely not an easy task. In the framework of the MoPAct project (work package 5), Praxis Center for Policy Studies has carried out a desk research and analysed some of the good practices of social engagement of older people in Estonia. The report also aims to answer the questions of which are the main barriers and success factors that prevent or foster the social engagement of older people.

In the first part of the report the methods of the research are introduced. The second part concentrates on the main findings that resulted from desk research and focus group. In the end, main conclusions and recommendations are pointed out.

## 2. Research outline

### 2.1. Desk research

During first phase, the desk research was carried out. The main **research question** was: *“Which good practice examples of policies and practices are available that foster social engagement of older people with health limitations, who live independently?”*

There were also **three subquestions**:

- What elements (or factors) make good practices or policies successful?
- What are thresholds limiting the successfulness of the practice or policy?
- What preconditions are necessary for the practice or policy to be successful?

**The main criteria** that had to be met during the selection of good practices were the following:

- The main target group of the practice or policy are older people with health limitations or frailty.
- The initiative responds to problems and needs of older people with health limitations or frailty that prevent them from being engaged in social life.
- The goals of the intervention or policy are well defined and directly relate to challenges in the field of active ageing of older people with health limitations.
- The practice works systematically to reach the defined goals.
- The practice or policy is developed by ‘meso-level’ organisation.
- The initiative is located in the country of the research.

The process of the desk research took place between April and May 2015 and consisted of different phases:

- 1) A broad-based search was that was carried out by using relevant key words and Boolean operators in a Google search engine.
- 2) The web pages of the relevant organisations were searched, e.g. Ministry of Social Affairs (especially its subdivision ‘for elderly’, <http://www.sm.ee/et/eakale>), The Estonian Chamber of Disabled People (<http://www.epikoda.ee/in-english/>), Estonian Association of Pensioners’ Societies ([www.eakad.ee](http://www.eakad.ee)), NGO The Self-Help and Advisory Association for Senior Citizens (<http://www.venu.ee/?lang=eng>), etc.
- 3) Different information databases were searched. Publicly available data regarding the projects that had received EU or state funding was examined, e.g. the database of National Foundation of Civil Society (<http://www.kysk.ee/supported-projects>), the projects that had received funding from European Social Fund (<http://www.strukturifondid.ee/list-of-beneficiaries/>), etc.
- 4) Relevant documents were studied, e.g. Aktiivsena vananemise arengukava 2013–2020 [A Plan for Active Ageing 2013–2020].
- 5) A special request to the Estonian-wide network that unites many organisations and volunteers was also made through the coordinator of the portal ‘The gate for volunteers’. It was requested that if somebody has used older people for voluntary work or knows another

organisation that has done that, such information would be provided to the contact person in Praxis. There were several answers that arrived as a result. Some were included to the further research (Pärnu Sports Club), some were set aside since they did not match the criteria well enough or the contact person was not willing to share further information.

- 6) Relevant persons were consulted, e.g. from the Ministry of Social Affairs.

As a result of the desk research, one could see that **it is not possible to meet all the criteria simultaneously** and some compromises had to be made. More specifically:

1. It was not possible to find projects or activities that concentrate specifically on older people **with** disabilities. In Estonia, there are projects/practices that focus on older people with no additional requirement that the person has to have a disability (or other health limitation). On the other hand, there are projects that focus on people with disabilities without a precondition that the person has to be old.
2. The same applies to the different categories of social participation. If the aim of the project is volunteering, the projects do not usually exclude people because of their age. As mentioned earlier, in Estonia the tradition of volunteering is not very widespread and excluding any segments because of their age, gender or other characteristics is not reasonable.
3. One of the aims was to differentiate between volunteering and informal care while selecting the best practices. In most cases however, the practices focus simultaneously on both aspects (the only clear exception is NGO Pärnu Two Bridges Sports Club and, to some extent, the activity of companion ladies).

Due to abovementioned reasons, it was not possible to concentrate only on older persons with disabilities or frailty while selecting the good practices, but rather on practices that were targeted towards older people in general. However, according to the 2011 census data (see Statistics Estonia) around 60% of older people in Estonia have (serious or some) health problems. Therefore, among the practices that were analysed are many people with disabilities or other health problems. **It was also asked specifically during the interviews if and how organisations engage or deal with older people with health limitations.** The information that was attained is pointed out in the description of the practices below. In addition, it should be noted that in some cases a section of the practice focuses on older people with disabilities, e.g. companion ladies with stomata; disabled ex-medics. Likewise, this part of the practice is highlighted below.

**As a result of the desk research, the following good practices were selected:**

1. An organisational model of a daily centre for the elderly, in which older people are responsible for taking care of the provision of the activities, for the maintenance of the house, etc. (based the practice of The Self-Help and Advisory Association for Senior Citizens). The focus of the practice is mainly on volunteering and, to some extent, also on informal care.
2. The service of companion ladies (based on the activity of Pelgulinn Community Association and NGO "Teeme"), with the focus on volunteering and informal care.
3. The engagement of older people in the organisation of sports events (based on the activity of Pärnu Two Bridges Sports Club) focusing on volunteering.
4. Activating older (unemployed) people through the work practice (based on NGO Work Club 50+ of Kohtla-Järve) focusing on volunteering and, partly, on informal care.

5. The provision of informal care to elderly and disabled persons (based on the activity of the NGO Tartu City's Association of Disabled Ex-Medics "Mercy") focusing both on volunteering and informal care.

In the second phase of the research, **interviews** were carried out with the key persons who represented the selected best practices. The aim of the interviews was to acquire information on the three subquestions presented above. The interviewees were carried out with the following persons:

Interview 1	<b>Vanurite Eneseabi- ja Nõustamisühing</b> ( <i>The Self-Help and Advisory Association for Senior Citizens</i> ) Jaan Poska 15, Tallinn 10126 Web: <a href="http://www.venu.ee/?lang=eng">http://www.venu.ee/?lang=eng</a>
Interview 2	Pelgulinna Selts ( <i>Pelgulinn Community Association</i> ) Õle 1, 10611 Tallinn Web: <a href="http://www.pelgulinnaselts.ee/">http://www.pelgulinnaselts.ee/</a>
Interview 3	<b>Spordiklubi Pärnu Kahe Silla Klubi MTÜ</b> ( <i>NGO Pärnu Two Bridges Sports Club</i> ) Suur-Jõe 50a, Pärnu 80042 Web: <a href="http://www.2silda.ee/defaulten">http://www.2silda.ee/defaulten</a>
Interview 4	<b>Kohtla-Järve Töötajate klubi 50+</b> ( <i>NGO Work Club 50+ of Kohtla-Järve</i> ) Metsapargi 14-5, Kohtla-Järve 30324 Web: <a href="http://www.kj.klubi50.ee/index.php">http://www.kj.klubi50.ee/index.php</a>
Interview 5	<b>Tartu Linna Puudega Eksmeedikute Ühing "Halastus"</b> ( <i>Tartu City Association of Disabled Ex-Medics "Mercy"</i> ) Hurda 7-2, Tartu 51005 Web: <a href="http://www.tartukoda.ee/?sisu=107">http://www.tartukoda.ee/?sisu=107</a>

Due to large geographical distances, the interviews were carried out via telephone, except one interview (Vanurite Eneseabi- ja Nõustamisühing) that was face-to-face. All of the interviews were recorded.

## 2.2. Focus group

The focus group interview was held on 29 May 2015. Almost all participants were representatives of good practices that were identified in the first stage of the research. One person, the coordinator of Viimsi municipality Neighbourhood Watch, was invited since she had been actively involved in the issue – she had organised a public event on that topic that gathered different stakeholders (politicians, representatives of local governments, government agencies, CSOs, etc.). One representative of a good practice did not participate in focus group due to health problems.

Geographically, people were invited from all over Estonia – only two participants were from Tallinn.

The aim was to create a free and informal environment during the focus group, in order to encourage people to express uncomfortable ideas and hidden problems. We consciously avoided to get the 'right' answers or hide some aspects of the problem as 'unimportant' or too 'niche'.

The focus group interview was recorded.

**The structure of focus group was as follows:**

- **Introduction** of the project, the goals and schedule of the focus group.
- A short **presentation** about active ageing in Estonia, i.e. Estonia's position among other EU countries according to AAI. The idea was to unify the terms and to provide some additional knowledge for participants.
- **Introduction** of the participants – participants' names, organisations and backgrounds. Besides other benefits, networking is one motivator for participating in a focus group and this worked very well in this case.
- The **discussion** and picking out most **critical keywords** in terms of success factors and barriers of active ageing. This was a 'brainstorm', where each participant talked about their experience and, based on that, mentioned success factors and barriers that he or she has encountered in their work. The keywords were written down on a flipchart so that every participant could have a visual overview of what was discussed.
- **'Voting'** in order to find the keywords that seemed most relevant for the participants, each participant prioritised the keywords by placing three green dots to success factors and three red dots to barriers. One could put one dot per keyword or three dots to one keyword if he or she wished. The voting gave a good picture of how participant prioritised different success factors and barriers. It should not, however, be overestimated since the voting result depends greatly on the phrasing of the keywords and there was not much time to think them through. Therefore, when analysing the results, the overall dynamics of the discussion (emphases, agreements-disagreements) were taken account as well.
- Summary, feedback.

**Participants of the focus group:**

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Interview 5	<b>Tartu Linna Puudega Eksmedikute Ühing "Halastus"</b> ( <i>Tartu City Association of Disabled Ex-Medics "Mercy"</i> ) Hurda 7-2, Tartu 51005 Web: <a href="http://www.tartukoda.ee/?sisu=107">http://www.tartukoda.ee/?sisu=107</a>

## 3. Results

### 3.1. Desk research and interviews

As a result of the desk research, five practices were identified, which complied with the criteria in the best possible way. As already mentioned above, some compromises had to be made in the case of all practices in terms of fulfilling the criteria (see p. 5).

#### 3.1.1. Practice no. 1: The operating/organisational model of The Self-Help and Advisory Association for Senior Citizens

The main idea of **The Self-Help and Advisory Association for Senior Citizens** (the Association) is to engage active older people, by assigning everyone a task and responsibility. In return, a member of an organisation can take part in the organisation's activities (events, hobbies for free, spend time every day in the Association, etc.). The usual tasks that members fulfil are related to cleaning, catering, gardening, etc. (see also Annex 1). The Association focuses therefore mainly on volunteering, but to a certain aspect also on informal care by supporting those members who are sick in home or in hospital. There are also some other organisations in Estonia which work based on similar principles, e.g. Kodukotus in Tartu, but the Association in Tallinn is one of the largest and oldest.

#### Success factors

- **Everyone in the Association has a responsibility that is suitable for his or her abilities.** A readiness to contribute is a necessary precondition when someone wants to join the Association. The main reason for this is that people who have a task remain more vital and take better care of themselves. In addition, some specific skills and knowledge of some members can be used for the benefit of the others (e.g. doctors measure blood pressure and consult on health issues). Some older people also learn new skills (cooking, painting, etc.), which keep them active.

*"There are several day cares where people just go and everything is ready-made for them...But in the context of dignified ageing it is very important that a person would perform a task... I can help myself with that... and others... and feel that I'm still important."*

*"People live longer and are healthier when they have a meaningful task."*

No one is asked to do something in the Association that they cannot do by not having necessary skills or ability. However, people are encouraged to learn new skills and try something they have not done before.

- **Knowledge that a member can get something in return and an assurance that other members take care of each other in case of need.** Knowledge that you can have new friends, take part in every activity in the organisation for free is motivating for people. Besides that, members of the Association look after each other (e.g. there is an SOS-team) if someone gets

sick and is unable to leave home, needs some advice or is widowed, for example. The members of the Association also visit members in nursing homes and hospitals.

*“In addition to self-help we’ve got the consulting [aspect in the organisation]... There are retired doctors and psychologists and a psychiatrist... Former doctors measure blood pressure every week. They do not write out prescriptions, but they hold your hand and guide and advise... Some have organised music therapy sessions, monitor magnetic storm days... It’s very important that someone listens to you.”*

*“Some learn new professions... We have recently many so-called ‘late risers’ like they call themselves... People in retirement age discover now that they can paint... And a few people have already made an exposition in our gallery here...”*

- With respect to the previous two points made above, the Association has a **well-defined mission and values**, and also has held on to them. They mostly concern the idea of members’ contribution and that if there is a member who is constantly not willing to fulfil a task, then he or she cannot continue in the Association. Of course, it is taken into account that people are sometimes unable to fulfil their tasks (because of the other responsibilities, or health problems).

*“If you want to become a member you need to take a certain task... There are, of course, some black sheep who... want only to get free language training or something else. But we try to be onto it immediately... At least we are trying so that each new member who comes already takes a task in the start.”*

- **A relatively good state of human resources in the organisation.** There are currently enough members who are active and willing to participate. These people carry out the activity of the Association. This has not been easy to achieve and the situation has not been so good all the time however, and even now there are some difficulties in finding these members who are willing to take part in the leadership.
- **Good relationship with the state, Tallinn municipality, some politicians and other public figures.** Tallinn municipality has given the Association the facilities and a plot for long-term use, which is located very close to the centre of the town. Local government also provides some funding for the Association. Both factors have facilitated the work of the organisation. Cooperation is also good with the state institutions (Ministry of Social Affairs, etc.).
- **Credible funding strategy of the Association.** Although it has very limited resources, the Association has always tried to have a vision and plan how to finance its activities and earn its own income. Next to the daily centre there is also a guest house, which helps to earn additional money. According to an interviewee, the financial stability and foresight shows credibility and reliability to other partners.

*“We made a guest house next to us ... and it helps to earn the basic income... So that if something happens, you should not shut the doors... and it is a great thing. We demonstrated that we can manage... but it is not enough - please help us, and then they help. If you’re only going to hold hands, then it does not go so well ... It works so far.”*

- The Association has demonstrated proactiveness and readiness to be **engaged in different (political) initiatives and networks**. It has also introduced its organisational model actively among others. For example, the Association is **disseminating information** about the organisational model (by publishing a book, having a good web page, organising different competitions, like 'The best grandparent', etc.). For this reason the Association is also relatively well known.
- **Good facilities, pleasant atmosphere and beautiful surroundings**. According to the interviewee, the interior of the daily centre has been designed in a way that people would feel like a home ("*It has to be like a home here or even better than home.*") This brings people to the Association and creates a sense of belonging.

### **Barriers**

- There are always some people who are **not willing to take responsibility**, but want to enjoy free classes and events. As previously mentioned, the leading principle of the Association is that everyone has to have a task and commit in some way. If a person does not share these values he or she cannot continue in the Association. There are not many members of this kind, but there have been certain cases according to the interviewee. It is also always taken into account when something happens to a person (whether temporarily or permanently) and he or she cannot contribute to the activities of the Association anymore. In easier cases, members just reschedule the tasks or select an easier task, in worse cases he or she becomes the one who is being helped by other members.
- **The financial sustainability is always a concern**. The support from Tallinn municipality is important, but it is not enough, especially since the state plans changes in the tax system that will very likely raise the prices of the guest house. The interviewee states that the organisation has been acknowledged (publicly) several times, but there is a need for constant and long-term support.

*"They [politicians] do not ask how you can manage... It is considered already self-evident that we are so good and wonderful... and, therefore, cope well. But coping requires the efforts and strength."*

- A pressure to comply with some **bureaucratic requirements** that the NGOs have and a **lack of members who could take some special tasks** in the organisation. For example, there has to be an accountant who is capable of compiling a balance sheet. In addition, there is a lack of those members who would be willing to be in the management board. Consequently, the board members have been the same for a long period and do not rotate.
- Older people are not well- represented in government institutions, **in parliament, etc.** Although in Estonian society the representation of older people is steadily increasing, their engagement to the policymaking process is not. The policies rather reflect the needs and expectations of younger people and the needs of older people can remain ignored.

### Preconditions

- People who want to take part in social activities and be a volunteer need to have **enough free time and material resources** for that. In Estonia, many older people have to continue working after their retirement due to their low income and that prevents them from being socially active and contributing as volunteers.
- A person who wants to be a member has to have a **necessary mind-set** and an **interest to contribute**. People who are rather passive do not usually become members of the Association, but there are some exceptions.

*“Most of them, who come to us, have previously been active... retire... and looking for application now. There are also few of those who have not been active, however, but who are trying to become more active.”*

### **3.1.2. Practice no. 2: The service of companion ladies**

The aim of the **Companion ladies’** service is to help older people who are living alone by providing them voluntarily a company. An additional goal is to help to maintain the activity of volunteering persons themselves who are also older people since they have more free time and can relate better to older people. The service of Companion ladies is known to be offered by two organizations in Estonia (Pelgulinn Community Association in Tallinn and NGO “Teeme” in Viljandi) The companion ladies who have a stoma provide special support to cancer patients also with stoma (see also Annex 2).

### Success factors

- One of the most important success factors has been **good groundwork** that helps to find out about the aspirations and interests of a person who wishes to be a companion lady, but also of a person who wants to receive the service of a companion lady. The groundwork means usually a short visit to a client’s home and a small chat with him or her about the expectations towards the service. In addition, a conversation with a potential companion lady about the content of the work is necessary. This has helped to avoid possible conflicts and avoid letting people who are not suitable for the work become companion ladies. For example, a person who wishes to become a companion lady should have rather neutral views in political, as well as in religious matters.

*“At first I go and visit a client at his or her home in order to see which companion lady would suit him or her... because I want to see where my companion lady goes to ... I don’t want that [the clients] would pour all their anger and bitterness at them...”*

- The interviewee from Pelgulinn Community Association emphasises that they also have a very good and **trusting relationship with local government officials**, who can mediate the contacts of the people who need support. If officials understand that the activity of an organisation is valuable, it is also easier to get funding from the local government.

- **Stable funding** – the organisations have been able to guarantee a stable funding from some sources (municipality, etc.), which is necessary to keep the service going, but it is still not enough and it is mostly project-based.  
*“It’s really terrible to be without money... We have received 300–400 euros in a year... It is really big money that we can use.”*
- A factor of a crucial importance in case of this practice is the provision of **psychological support** for companion ladies (therapy, supervision, etc. that the volunteers would handle different personalities, needs and expectations).
- **Motivation and acknowledgement** – since volunteer are not paid for their work, it is important to motivate them in some other way by offering a free excursion, public acknowledgement, etc. For example, Pelgulinn Community Association organises tea evenings, where the companion ladies also participate.  
*“But you need to thank them... with a flower or a concert or with anything else... or just thank them... we’ve got tea evenings... I intend to thank all of them one by one... everyone needs acknowledgement...”*

### Barriers

- It is hard to find suitable people for the work. It has been especially difficult in the case of persons who are non-native Estonian speakers since they do not speak enough Estonian. The companion lady also has to have a suitable personality, i.e. she cannot impose her ideological and religious beliefs on another person. As the interviewee mentioned: *“Jehovah’s Witnesses want to join, but I won’t let them.”*
- It has been **difficult to find sustainable funding** for the provision of the service. To a certain extent, local government helps, but it is not enough to enable service development, long-term planning, motivate and provide psychological counselling for the volunteers. The funding sources are limited also due to the fact that most clients are not capable to pay for the service themselves.  
*“Last year when we didn’t get the funding, it was really difficult...”*
- Both organisations claimed that companion ladies are very receptive to **psychological problems**, which are related to the fact that they deal with the problems of the clients and they are not able to distance themselves from these problems. The clients sometimes also have difficult personalities and tend to manipulate the volunteer. That has already caused several burnouts in practice.  
*“They cannot differentiate others’ concerns from their own ones...and they just burnout. I’ve got four or five companion ladies that have burned out like that.”*

Therefore, the interviewee found it necessary to offer appropriate support and counselling for volunteers on how to deal with (psychologically difficult) situations.

- **Finding suitable clients** can be difficult sometimes. Sometimes people refuse the help, by being very embittered and disappointed in life. The companion lady can easily become a 'lightning rod' like this, who is getting all the bitterness and anger. There are situations in practice where a service has been refused to some clients.
 

*"Some people are at loggerheads with him/herself, with relatives, with the community... and it stays inside you for years... and you can do nothing about it."*
- **Different expectations towards the service and role** of companion ladies. There are situations where it has been presumed that the companion ladies provide personal (physical) care, e.g. help with washing clothes/dishes, do shopping, cleaning, etc. It has been also believed that the companion ladies look for partners. In practice the companion ladies do not have to do anything else but chat and therefore it is very important to manage these different expectations.
 

*"The elderly haven't understood who is a companion lady... Some older gentlemen have looked for a partner... some have thought that we've got a pension house."*

*"Old people are strange sometimes... once you provide them a favour... He/she starts to demand it also next time."*
- **There is nobody to learn from** how to improve the service, what are the mistakes to avoid, etc. This is especially the concern of the organisation that is located in Tallinn and that has offered the service since 2004. There has not been any communication or cooperation between the two organisations (until the focus group where both organisations were present), but there is a desire to do that.

### Preconditions

- **An active mind-set and lifestyle.** The companion ladies are rather persons who already like interaction with different people, who are also helpful and have a sense of empathy. At the same time, it is important not to take others' concerns too much to heart and have the ability to distance herself from the concerns, worries and demands of the client.
 

*"Some are clinging to their TVs and soaps. So she needs to have some kind of disposition [to do that work]... like she's been active when she was young."*
- **A neutral world view** and/or an ability not to impose her beliefs on another person.
 

*"We went to visit all churches... Because you'll never know who is the person you are going to visit... and you can't insult anyone. So we familiarised ourselves with all beliefs, so that there wouldn't be any discords."*
- The organisation has to offer **motivation and acknowledgement** to the volunteer. Since volunteering is free and the companion lady's work is rather demanding, it is important to motivate them in some other way. Organisations engaged in the study have offered free excursions, given letters of thanks, public acknowledgement in the media, organised gatherings, like tea evenings, etc.

- **There has to be clear communication** what the work consists of, which characteristics it presumes, what are the challenges, what kind of personality it presumes, etc. Otherwise, people might have wrong expectations. As the interviewee points out:

*"...some young people have joined and then left... but they've done it politely... they've said that this work is not for them."*

### 3.1.3. Practice no. 3: Activating people who are more than 50 years old through voluntary work in the city of Kohtla-Järve

The main idea of that practice is to activate people who are more than 50 years old through professional development, civic participation, cooperation and creativity in the eastern part of Estonia, Kohtla-Järve. The practice is based on the activity of the **NGO Work Club 50+ of Kohtla-Järve**. The practice is specifically targeted at older people in order to maintain their social activity through voluntary work, by also providing, among other things, informal care (e.g. to the parents of disabled children, the elderly living alone, etc.). Many members of the Work Club have some kind of health limitation as well (see Annex 3).

#### Success factors

- **The existence of active members** who are interested in life, who are willing to help others and contribute to social matters. The members of the Club have participated well so far, they have participated in meetings, etc.
 

*"People can interact with people... they do not sit at home... they still live. So we'll try to disseminate information about free events every month, and they take part and interact... They do not feel lonely like that, and are among people. All of them are trying to come to meetings and events."*
- Everyone has a **suitable role/task** in the organisation. Many members in the Club have some sort of health limitation. Therefore, a person can choose a suitable task and if needed, the members help each other, also physically. The interviewee is also a social worker and supports members if necessary. There is also a range of therapies (art therapy, movement therapy, etc.) and services (psychological counselling) that the members can use together with their clients for free.
 

*"We offer counselling and psychologist help... It is free of charge. There's also art therapy and movement therapy that the members can take with clients."*
- Tight cooperation **with partners** such as the Estonian Unemployment Insurance Fund, Estonian Red Cross and local self-government. Some partners mediate the contacts of people in need (whether of the elderly, children or disabled persons), others provide some other possibilities, e.g. possible tasks, facilities, events to take part in, etc.
- The organisation has worked on **possibilities to motivate its members and volunteers**. For example, the Club has given members diplomas and organised excursions. In addition, simply the possibility to communicate with other people (in gatherings) is a motivator for many people. The Club also offers possibilities for its volunteers to take part in counselling and therapies.

*"It is necessary to motivate people... and you don't have a right motivator always... Everyone also has a different motivator. We do excursions, give diplomas... People are pleased if their work is valued..."*

- Ambition **to develop the NGO**. Currently, the Club is trying to work out a financial plan how to earn some additional income, for example the Club could provide the service of a support person.

*"We'll try to start to earn extra money... and we want to work out a personal support service which we would then sell to the city. Everything cannot be done for free as well."*

### **Barriers**

- Difficulties in finding the **right motivator** for members, which would keep them active. This is closely connected to the subsequent point, which indicates that the organisation operates within very limited resources. It is therefore a challenge to find a suitable motivator for people who do not get any money for their work.
- Limited amount **of financial resources to develop the NGO**. The Club applies for different project funding, but this is not very sustainable. An adequate income is also necessary for the organisation in providing the right and sufficient motivators for volunteers.
- Some older people are **depressed, passive** and feel like their contribution is no longer needed. It is very hard to find a connection and activate them. However, the Club is also making an effort to reach these people.

*"Currently, there are a couple of people who have stayed at home alone for a long time. And they've got depression. We try to engage them anyway..."*

### **Preconditions**

- A person has to have **an active attitude** and a will to help. The Club also makes efforts to engage these people who are initially less active. At the same time, it is taken into account that during some period people might be less devoted and then, after a while, become more active again.
- **Motivation**. This was considered one of the most important issues of an organisation. The main question is how to motivate the members and make them feel that their contribution is valued, especially in the context of very limited financial resources. In addition, it has to be taken into consideration that the motivator can be different in case of different people. Therefore, it requires a very personal and individual approach as well in order to find out what motivates volunteers the best.

### 3.1.4. Practice no. 4: Provision of support and care by senior volunteers to disabled elderly living alone

The main purpose of the **Association of Disabled Ex-Medics “Mercy” of Tartu City** is to help people who are old, disabled and live alone, but also to keep the volunteering members active, encourage and support voluntary work in older age. Today, there are approximately 25 members out of 105 who are able to help others. Since there are a few former medics among the members of the Association they also address the health issues that the members might have by consulting and providing advice (see Annex 4).

#### Success factors

- **Will and ability to help** – there are still members who have the will to help other people and who are able to do that. The average age among the members of the organisation is very high (over 80) and all of them have health problems (a disability), which makes helping others quite a challenge.

*“A will...to be useful and help ... as long as you have the strength and stamina”*

- **A sense of solidarity** – knowledge that others will help you when you need it has created shared interest and understanding among the members. Since there are members who have been working as doctors there is always the possibility to consult a professional (e.g. there is a special telephone line).

*“Every day someone calls – we consult and communicate on a daily basis on the telephone... if something has happened.”*

- **Good cooperation with partners.** For example, the Department of Social Welfare of Tartu municipality helps the Association with advice, financially and with the transport. Tartu County’s Board of Disabled People provides managerial support for the Association.

*“For the second year, the social welfare department in the city [government] gave us a bus which helped us to spread the 30 aid packages... And there was no money taken for that from us... There’s been very sympathetic attitude towards the Association.”*

#### Barriers

- **An inadequate amount of financial resources** to implement the purposes of the Association. For example, there are not enough resources for transport. Thus, it is difficult to organise transport for elderly people to visit, for example, the doctor.

*“The transport aid is very small ... we can’t get the elderly to the doctor... and we don’t get money for that... Many live far away from the bus stop. In case of some events, we are organising a fundraising, so that people can come and go back to home from the event.”*

- **Technical barriers** – sometimes it is not possible to see and help a person since the access to his or her home has been made very difficult, i.e. the doors and gates must be opened with codes, etc.

*“If someone is sick and feels bad... she or he cannot come and open the door... and like that she or he will remain without aid.”*

In addition, for the elderly who have their money in the bank but live alone and cannot move, it is difficult to get money out of the bank to pay for medicines.

- **Relatively low interest among younger volunteers and medics** towards joining the Association, which means that there are not very many of those who could help others. Those who currently help others, need help as well.
- There are also not many of those **members who are willing to take responsibility in the board** of the organisation. According to the interviewee:  
*“It has been difficult to get people to the board... Nobody wants to do this work without money ... Some even say that [to me].”*

Therefore, the managerial resource and organisational sustainability is rather limited for the Association.

### Preconditions

- There have to be **active members and volunteers** who want to help and are able to help others.
- **Motivation** – the hard work that the volunteers are doing has to be rewarded somehow. The Association organises, for example, some social gatherings (‘tea evenings’).

### **3.1.5. Practice no. 5: The engagement of senior volunteers to the organisation of sports events.**

The main aim of the **Pärnu Two Bridges Sports Club** is to promote sports habits and opportunities in Pärnu, Estonia, including older age people. The Club brings together people who are interested in sports and who want to develop and support physical activities. The issue of volunteers’ health limitations have not directly arisen. According to an interviewee, the senior volunteers have had a rather good health condition (see Annex 5).

### Success factors

- **The possibility to socialise and to communicate** with people from their own age group. There are people with very different ages that take part in sports events and it provides the possibility to communicate with people from different generations.  
*“The older-aged volunteers belong to a [informal] network in which they have already known each other for a longer time and cooperate during other events as well. What*

*is especially positive is that recently, long-term participants of various sports events have started to join the Club."*

- **Feasible tasks.** For example, for the volunteers with a higher age the tasks cannot be too physically demanding. In every case, it is asked which tasks a volunteer wants to perform and what kind of limitations he or she might have. According to the interviewee:

*"The Club's position is that every person who wishes to help in the organisation of a sports event can be found a suitable task."*

There are tasks, for example that do not require heavy physical effort, e.g. at the registration desk, as a referee, etc.

- **Motivation.** There has been always some kind of 'treat' or a bonus for a volunteer. For example, the Club has offered free public transport for one day. The sponsors' help is used for offering bonuses and rewards. The volunteers are also motivated through their engagement to different staff events, like lectures and team building trainings.
- The **tasks are well explained** to everyone prior to an event. The interviewee also mentioned that:

*"... most of the elderly volunteers are the same every year and the organisation of the events is similar, so they already know quite well what to expect."*

- There are people who understand that every type of **activity is useful** for people, especially for those at a higher age. These people also contribute as volunteers and participate actively. As the interviewee mentions:

*"Any kind of activity, and 'coming out of the house' is useful for people at a respectable age – there are those who understand it and actively assist organisation of the events. There are certainly those who have the habit to do that..."*

### **Barriers**

- **A clash of age-related mentalities and understandings.** The interviewee mentions that:  
*"In practice, there are only few such cases, but it's still an issue that needs special attention."*

### **Preconditions**

- **Tolerance towards different views and understandings.** The team in the Club has accepted the existence of different mentalities and values. Therefore, it has been considered rather as a shared understanding that differences should be accepted and treated respectfully.  
*"Seniors are quite loyal and stable staff and over the years they've had a close contact with younger people. This has kept their worldview rather youthful and helped to keep pace with innovations."*

- Helping the organisation of sports events presumes some kind of **physical mobility**. Depending on the task, the day can be 5–6 hours long or even more. Since the task will be explained to a volunteer and its duration, he or she can immediately tell **whether the task is suitable for him or her or not and this is the main way of coping with the special needs that the senior volunteers might have due to their health limitations**.

All the practices that were described above involve some peculiar factors, which are rather characteristic only to these individual cases. At the same time, they also offer quite a similar pattern of factors, which enables to highlight some of them. All of the factors (success, limitations to success and preconditions) presented above can also be categorised according to their substance, either as **organisation-based factors** or **human/character-based factors**.

More important **success factors** that emerged from the interviews were the following:

Human- based factors	Organisational factors
If there are people in the organisation with similar attitudes and values, there is also a <b>sense of solidarity</b> that provides reassurance that <i>“if I help others, then I can rely on the support of others as well”</i> .	<b>Enough human resource</b> , i.e. existence of active members/volunteers, who are willing to contribute and who share the values of the organisation.
Since most of the older people have some kind of health limitations, it is very important that there would be a <b>suitable task and a role in the organisation that would comply with their wishes, skills and abilities</b> . Most of the organisations that we analysed offer some kind of possibility to choose a task by the person.	All organisations mentioned <b>acknowledgement</b> of the volunteers/members as an inseparable part of its activity. All volunteers need some kind of motivation – the more demanding the work is, the more motivation is needed. The organisations used different strategies to reward volunteers, e.g. give letter of thanks, organise free excursions and other social events.
	<b>Cooperation with partners</b> (especially with the municipality) was considered one of the most important success factors. Partners are important if an organisation needs contacts (of people in need), they can support materially or they can help in some other way.

More frequently mentioned **barriers** were:

Human- based factors	Organisational factors
Finding <b>suitable volunteers</b> can be problematic for some organisations. This especially concerns these organisations which are engaged in the provision of services that presume certain characteristics.	One of the most frequently mentioned concerns was the <b>financial sustainability</b> of the organisation. Almost all organisations receive some sort of material support from the local government, but they all said that it is not enough for long-term planning.
Most interviewees admitted that the <b>passiveness</b> of some people and/or members is a problem. In addition, engaging these people and making them active is considered one of the most difficult tasks.	

The **preconditions** of social engagement that were most frequently mentioned during the interviews:

Human- based factors	Organisational factors
Interviewees said quite unanimously that people who want to become volunteers or members of an organisation need to have an <b>active mind-set, a readiness to contribute according to his or her abilities, enough free time and material resources</b> . Everyone accepted that there can be exceptions temporarily, but a person has to have a will to contribute.	The organisation has to offer some kind of reward or <b>acknowledgement</b> that would motivate older people to work as volunteers (and not only for one time, but for a longer period). The organisation has to work strategically on the question of how to find an adequate motivator for its volunteers/members.
People have to be <b>tolerant</b> towards other people, beliefs and understandings, but at the same time self-confident enough. This especially concerned the volunteers that deal with vulnerable people.	Before the assignment of a task there has to be <b>good communication</b> on what it involves, what are the challenges and what can be expected. The more challenging the work will be, the more important it is. This could also mean that the person can choose between different tasks.
	In the case of some type of engagement/voluntary work, special <b>support and counselling</b> is necessary for the volunteers. This is especially important when people have to deal with difficult characters or complicated situations of some clients.

### 3.2. Focus group

The discussion of the focus group was rather consensual and no fundamental differences emerged in terms of opinions. At the beginning, it was asked what kind of obstacles the participants have encountered when talking about the engagement of older people into the activities of their organisations.

#### Barriers to active ageing

According to the participants, the biggest obstacle to activeness of the elderly is the **lack of prior activity**. The most active seniors are usually those who have been active in their youth as well (through hobbies, socialising, etc.). It was acknowledged that it has been most difficult to engage these people into their activities that are passive due to habit or lack of opportunity to be active.

*“It depends on whether a person has had some interests or hobbies during his or her active work life. Those who have had a hobby ... besides their personal work and home tasks, converge also when they have retired ... into some hobby groups or associations. These people who haven’t had a hobby... only work and children... they are the ones who remain between four walls.” (NGO Teeme)*

Another obstacle has been the **lack of adequate support structures** that would guide new retirees towards organisations and activities that would enable them to remain active. Working part-time is a good way to stay also socially active, but it is often difficult for seniors to find such work, especially outside Harjumaa (i.e. the county closest to the capital). Working full-time is an option that many older people use, but it can be exhausting and does not leave time and energy for voluntary activities. Similarly, people who remain at home quickly become passive and after that it is very hard to engage in social activities, e.g. volunteering.

Participants agreed almost unanimously that the aforementioned obstacles are the most significant. The following factors that were mentioned are slightly less important.

- Almost all participants mentioned the **poor financial situation of CSOs dealing with seniors** as one aspect that makes their activity more difficult. It was especially emphasised in the context of the need to find (right) motivators for the volunteers. Since the organisations do not pay any salary (or stipend) for a volunteer, there should be resource available to organise events for them or thank them in some other way. In addition, they lack means for training and/or counselling the volunteers, which is crucial for their work. Therefore, organisations need to combine different funding methods just to keep operating (e.g. to train and counsel their volunteers), the funding is short-term and project-based. In addition, seniors’ income is quite low, which makes it difficult to pay for events/services. Therefore, it is difficult for the organisations to earn extra income.

- An important factor that influences seniors' activeness is their **level of education and possession of certain (e.g. ICT) skills**. Organisations have noted that highly educated and computer-savvy seniors are more active in their organisations. On the other hand, it was pointed out that rapid changes in society (especially related to technology) make it difficult for seniors to stay informed and can cause alienation.
- **Lack of time**. As was told, many seniors need to work in order to make ends meet and the participants stated that *"if it is possible in some way, then people look for some job in addition to their pension"*. However, this leaves little time and energy for leisure and volunteering. Although it is possible in Estonia to work and receive pension benefits at the same time, it was mentioned that in some regions in Estonia it is difficult to find part-time work that would be more suitable for seniors' needs and abilities.

Many seniors are also busy caring for their grandchildren, sometimes due to lack of kindergarten places. Another aspect of the same problem is that active people tend to have several responsibilities and are therefore already overwhelmed. As one participant mentioned in the focus group:

*"These older people who are active already have too many responsibilities."*

*(The Self-Help and Advisory Association for Senior Citizens)*

- In some cases, participation in organisations is limited by **language barrier**. According to the focus group participants, it is an important obstacle when it comes to engaging the non-Estonian speaking population. That has been an especially severe problem for organisations that are based in Tallinn.
- In addition, the participants expressed several times that **bitterness, negative emotions and bad interpersonal relationships** are problems that isolate people. This was especially stressed by the companion ladies' service, but pointed out as a problem by other organisations as well. According to their experience, some seniors do not talk to or get along with their relatives and take the resulting bitterness out on anyone who tries to help them (i.e. also on senior volunteers).
 

*"It is very hard to get these people to be positive...and sometimes they ruin the whole atmosphere... They are not able to adapt in the positive environment anymore."*

*(The Self-Help and Advisory Association for Senior Citizens)*
- Some seniors are also **afraid to join new groups**, because they **have preconceptions and feel ashamed** about themselves. Some people (especially those with bad health, such as oncological disorders mentioned by the Pelgulinn Community Association) fear the judgement of others and think that no one needs them anymore. It is also difficult to join groups where one has not any prior acquaintances and according to the participants, the best way to engage new members is through informal connections.

- Finally, it was mentioned that the **data protection** makes it difficult for the organisations to reach people with poor health. Again, the organisations which provide the service of companion ladies found it an important obstacle. It is problematic, because a direct personal

approach is usually the most effective method for involving such people in activities, but the officials sometimes refuse to share contacts.

After obstacles the **success factors of the organisations** were discussed, and they can be summarised as follows:

#### Success factors that have encouraged seniors to be active

- According to participants, the best way to involve seniors to their activity is to **acknowledge and motivate** them. Organisations in the focus group have successfully used gift cards, free public transport, free theatre tickets, free tours, events, training, meetings, etc. to motivate volunteers. Another great method is personal acknowledgement (diplomas, etc.), especially when it is done publicly (e.g. through the media).
- Secondly, it is important to **increase seniors' financial security**. Participants agreed that seniors cannot be expected to volunteer if they must work to make ends meet. Employers should offer more flexible (part-time) working hours to seniors.
- Middle-aged (and even younger) people should also be encouraged to be active in order to create a **habit of active living**. The participants mentioned that most of the older people who are active in their organisations have had that habit already before. New retirees ought to be supported in their transition from working life to maintain existing habits. The emphasis should be on prevention as it is very difficult to reach seniors that are already passive.

A more concrete solution proposed by the participants is the promotion of flexible (including part-time) work. In Estonia, a person is allowed to work and receive a pension benefit at the same time. In some European countries it not allowed.

- In addition, local governments should be more active in promoting active ageing according to focus group participants. For instance, they could support the organisations that offer activities to seniors. Special attention by both local governments and NGOs should be paid to the so-called young seniors. As most events are aimed at young, middle-aged and very old people, this group tends to get left out.
- Voluntary work can be emotionally draining, so **supervision, counselling and training** are required to prevent volunteers from burning out. The organisations participating in the focus groups have seen numerous such cases. Companions and support persons in particular need help learning how to assert themselves, help others and avoid burning out. It is very beneficial to have healthcare professionals (former doctors, therapists, etc.) in the organisation as members.
- Participants noted that seniors sometimes also wish to socialise with younger people. Encouraging **communication between younger and older people** could therefore be a way to increase senior activeness. This also helps seniors stay in touch with societal changes, learn new ideas and skills (e.g. how to use a computer). On the other hand, seniors could share

their knowledge with younger people and play an important role. Small children could be persuaded to join in games, whereas slightly older children might be motivated by various boons (free theatre, summer camp, a way to feel useful). It was pointed out that young people could teach seniors computer skills.

- **Encouraging community activities** would be a good way to bring people together and engage them. Community spirit can be enhanced by cooperating with churches, organising village events, district events, sports events, etc. It is easier to include seniors who already have acquaintances in the community. This way, one can create a sort of supervision network that keeps an eye on lonely seniors living in the area.
- Information about events and services needs to be distributed through various **channels and communication networks**. This is easier to do in a tightly-knit community. Participants noted that people should be **kept informed** even if they are not actively participating in events. Seniors need to be invited persistently, **directly and personally**.
- In order to be involved with volunteer work, seniors need to be given **suitable tasks**. Some seniors cannot be physically active, so they need to be given a non-strenuous role (e.g. track judge in a sports event). One way to find out seniors' preferences would be to include them in the organising process.
- Participants stressed that **seniors should be involved in planning the activities and programmes that are aimed at them**. Often, seniors are presented with ready-made activities that they have had no role in creating. This way, they have no sense of responsibility or function and may feel less needed.

## 4. Discussion and conclusions

One of the main conclusions that can be made based on the experience of desk research, interviews and the focus group is that **there does not exist a good overview by any institution about the organisations, initiatives or practices** that deal with active ageing in Estonia. The information about that topic is rather informal and project-based. The poor information flow between different institutions was also mentioned by the participants of the focus group as one of the main reasons why older-aged people are not socially (voluntarily) active. The coordinating role of local government was seen as being central in this aspect. It is noteworthy, for example, that most of the organisations that were contacted during the study could not suggest any other good practices that would support the activity of older people in Estonia.

The reason for this is that there is no clear vision at national level on the issue of how the roles and responsibilities should be divided among different institutions (central and local government and civil society organisations) when talking about the social activity of the elderly. As mentioned above, there has not been any strategic view on active ageing that would have been put into practice. Currently, the Ministry of Social Affairs is drafting a new development plan, but the content of the plan has not been made public yet. However, given the nature of the issue, which needs a well-coordinated approach at all institutional levels and the inherent problems related to the Estonian administrative system (i.e. its functional and territorial fragmentation), there are no grounds to be too optimistic. Still, based on the suggestions stemming from the focus group, there is a need to concentrate strategically on creating **a habit** of (mentally, physically and socially) active lifestyle and that should be done when people are still young.

It can also be seen that the overall idea of engaging seniors as a specific age group is not central for most organisations that work with volunteers. For example, most practices that were analysed in the context of the current analysis<sup>1</sup> proved that it has not been the organisations' deliberate decision to focus on older people, but rather it has turned out like that in practice. There is not much communication/information also from the organisations that older-aged people are welcome to volunteer and it is not expressed that the tasks could be adjusted according to their abilities as well. It can be said, therefore, that the organisations have not fully acknowledged that older people can be a resource. On the other hand, there has also not been any signal that older-aged people would be excluded if they have expressed a will to contribute. Similarly, the spontaneous integration of different generations has taken place in practice in the case of many organisations and projects. The main concern here is that people belonging to vulnerable groups often need an explicit statement that they are welcome to participate, and, if possible, a personal approach to engage them (see also Matt & Ojakallas 2014).

When talking about the other **obstacles** to active ageing, it can be seen that the results of the focus group complement the findings of the desktop research and interviews. According to these findings, the most frequently mentioned limitations were the **person-related characteristics** such as senior's passiveness. That is closely connected to some earlier findings of another study which states that "individuals older than 50 years old are more passive than any other age group" (Kodanikeühiskonna ... 2012: 66; 108). In the focus group of the current study, it was developed somewhat further and

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<sup>1</sup> Except The Self-Help and Advisory Association for Senior Citizens' and Tartu City Association of Disabled Ex-Medics "Mercy".

pointed out that in many cases the reason for passiveness is lack of time, which is, in turn, caused by the necessity to have a full-time job and/or to take care of the grandchildren. The lack of time has also been found by other studies as the main obstacle for not participating in volunteering in Estonia (Uus *et al.* 2013).

**The poor health** of the older-aged people is another aspect that was pointed out in the focus group that may cause passiveness. This view is credible since there is plenty of data that demonstrates relatively poor health indicators of Estonian seniors (e.g. see AAI and SHARE results). For example, Estonia is in 23<sup>rd</sup> position among EU28 countries concerning the accessibility to health care services of the elderly. In addition, the number of years lived healthily is one of the smallest and the proportion of people with severe limitations in everyday activities is one of the highest compared with other EU countries (*Ibid.*).

**Education** is a more complex issue. It was pointed out several times by the interviewees that people who have a lower educational level tend to be socially less active. There are also other studies, which have found that the level of education is one of the most important factors (besides age) that influence social activity and volunteering (Lauristin *et al.* 2011; Kodanikuühiskonna...2012). As demonstrated by the Active Ageing Index, in comparison with other EU countries the educational level of the Estonian elderly is rather high. That indicates that there exists quite a favourable foundation for social activism among Estonian old-aged persons and the real reasons are hidden somewhere else when looking at the overall low participation rates in the higher age groups.

With regard to education, in the focus group it was found that a lack of certain specific skills (computer, language, etc.) among older-aged persons is also a factor that prevents them from being socially active and may cause an information gap. There are special projects and programmes for the elderly in Estonia with the aim to introduce basic **ICT skills** to them. Taking into consideration that information and many relevant services are increasingly in an electronic format, the need for such programmes is evident (especially if taking into account the somewhat surprising evidence that the elderly in Estonia lag behind in computer usage) (SHARE).

Concerning the language skills, it was also found in our study that in some cases participation in organisations is limited by **language barrier**. According to the focus group participants, it is an important obstacle when it comes to engaging the non-Estonian speaking population. In addition, Lauristin *et al.* (2011) found in their study that a large share of the non-Estonian (mainly Russian-speaking) minority (who do not belong to any CSO) (45%) think that the main obstacle which prevents them to take part in the activities of CSOs is their insufficient knowledge of Estonian language. There is also a correlation between a person's perception of his or her Estonian language skills and whether he or she has volunteered or belongs to any CSO. (*Ibid.*) The importance of language skills (i.e. an ability to speak Estonian) and its relation to social participation has been pointed out also by other studies: people who speak little or no Estonian are less active in social matters (Kodanikuühiskonna... 2012).

One factor that was mentioned during the interviews as well as during the focus group was the **poor financial situation of their organisations**. It was admitted that even though local government supports an organisation to some extent, it is still not enough. It is a common concern for many CSOs in Estonia and not only for those who deal with older people. For example, it was acknowledged

officially some years ago that the funding principles and practices of the CSOs are too diverse in Estonia and do not support their capacity-building<sup>2</sup> (see Matt *et al.* 2013). In practice, this means that the organisations operate mostly on project-based principles (also when providing the services) and do not feel financially secure enough to be able to set long-term goals. One of the most important sources of income for CSOs has become the membership fee. It is stable, but too small to enable strategic development of an organisation, especially in the case of organisations that deal with the elderly. Therefore, the question of how to earn additional income is on the agenda for all organisations that took part in the research.

When talking about the factors that have brought **success** to the organisations that were engaged in the research, the **existence of active members**, their personality and will to contribute was highlighted. It became evident that organisations need to make a special effort in order to create a sense of shared values and solidarity, but also maintain the activity of its members. It was, therefore, especially emphasised that paying attention to adequate motivators should also be an integral part of an organisation's operating model and in some cases, when volunteers deal with 'difficult' clients, a special support and counselling should be provided to them. In addition, good communication on what will be the tasks and the role of members/volunteers is crucial according to our findings. That helps to avoid any wrong expectations on both sides. Along with that, a possibility to choose suitable tasks that match seniors' abilities is equally important.

During the focus group some solutions that promote the social participation of older people were offered. For example, creating the social structures that would enable to continue an active social life after the retirement was seen important. In addition, increasing financial security, community spirit and involving seniors directly in the planning process was pointed out.

In sum, the selected good practices, which were studied during the current study, offer a range of observations that serve as a base for recommendations and further studies. The subsequent recommendations presume coordinated intervention at very different institutional levels (organisational, municipal and central governmental) and it is also highly doubtful that a notable change would be achieved if some of them would not take a role and responsibility.

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<sup>2</sup> Due to the same reasons the Ministry of the Interior has developed *A concept to harmonise the principles of public funding for CSOs* (adopted by the government already in 2009) and *Guidelines for funding the CSOs*. The idea is that there should be minimum standards in terms of definitions and procedures when funding CSOs from public resources in Estonia.

## Recommendations

1. **A nation-wide institutional framework and action plan** (which would specify the roles and responsibilities between the state, local government and civil society organisations and create linkages between these organisations) dealing with the issue of how to keep older people socially active **should be developed and adopted**. There was a strategy for Active Ageing in Estonia, but it was not implemented. So far, therefore, there has not been a systematic approach that would create ways for the older people to maintain their social activity (especially after exiting from the labour market). Currently, a new development plan is being drafted by the Ministry of the Interior – *Sotsiaalse turvalisuse, kaasatuse ja võrdsete võimaluste arengukava 2016–2023* [A Development Plan for Social Security, Engagement and Equal Opportunities 2016–2023] with an aim to adopt it in the beginning of the next year. The content of the plan is not yet public however, and it is not possible to say how this issue has been addressed in the document. An important concern is that the current administrative system in Estonia does not support the holistic approach of this issue. Consequently, it is also highly recommended to carry out an administrative reform in Estonia that would clarify the tasks and responsibilities between local and central government and develop more adequate financial bases for the municipalities.
2. The **information** about organisations and initiatives (national as well as local) whose aim is to foster the social activity of older people (including through voluntary work) **should be systemised and concentrated**. Currently, there is a lack of awareness and the information is very fragmented – there are several organisations, projects and initiatives that deal with the elderly, but it is rather difficult to find a decent overview about them. A good example is Vabatahtlike Värav [Gate for Volunteers], which mediates the possibilities regarding voluntary work. They do not focus, however, specifically on older people. The same site could be developed further by creating ways how older people would find information relevant to them (e.g. by creating different profiles for different target groups or so that older people could select suitable voluntary tasks according to certain characteristics, like the level of physical and mental effort needed for the work, need for mobility, etc.).
3. Social activity is rather a habit and embedded deep down in a personality that cannot be changed very quickly. The **support of people's social activity should start already when people are young(er)**. In addition, when planning the local, central and/or supra-national interventions in order to promote the social activity of older people (including at the level of awareness and attitudes, see p. 9), the whole lifecycle of a person should be taken into account.
4. In connection with the previous point there should be an institution that **supports the continuing activity** of the people right after their retirement. It should be acknowledged that it will be much more difficult to engage people later. This presumes an individual approach and a good overview of the local initiatives that the person could take part in.
5. In Estonia, older people are not volunteering since a large part of them still work due to very low pensions. As a result, older people have poor health, high levels of stress and a lack of time, which prevents their voluntary social activity. There should be found **ways to alleviate the financial situation of those who have retired**. One way is to support their social activity

(e.g. volunteering) through indirect measures, e.g. by compensating the transportation costs related to volunteering or enhancing their transportation/participation possibilities in some other ways.

6. **Different generations should be consciously integrated** as much as possible within different (project) activities. Older people could be engaged more into the activities of young people or children and vice versa. This integration could be enhanced actively and more consciously by designing special projects to achieve that; for example, older people could go and perform some tasks in the kindergartens (e.g. storytelling). It should be kept in mind that because of certain prejudices, older-aged people need encouragement that their participation is valued and an assurance that suitable tasks can be found for them. The integration can also take place passively by not excluding people because of their age, but this may leave out some potential participants because of their hesitations. It helps to create common understanding between generations, learn mutually and prevent labelling. It should also be deliberated whether and in which cases it is advisable to concentrate specifically on older people when engaging volunteers.
7. The tasks related to voluntary work of older people have to **provide flexibility** and the possibility to choose a suitable task. Since most of the older people have some kind of health limitations, the tasks should not entail heavy and/or long-term physical and mental effort. It is also important that the **tasks and roles would be well- explained beforehand**. This helps to avoid wrong expectations towards the work.
8. The volunteers in general (and also the older ones) are looking for **acknowledgement** and recognition that their work is important and their contribution has a value – that keeps them motivated. It becomes especially important when the voluntary work is longer and not just a one-time effort. There are different ways of acknowledgement, e.g. by giving the volunteers a thank letter, thanking them publicly, organising excursions and social gatherings, etc.
9. Through positive examples, initiatives and public communication **social values, attitudes and prejudices should be shifted** – the older people should be treated rather as a resource and not as a burden. As we live in the era of information society the role of (new) media is crucial in it, however, in such a challenging and long-term task, all stakeholders (state and local government institutions, CSOs, private enterprises, etc.) should be involved. The division of roles is crucial in this case (see also the first point). Along with that, older people should be encouraged to take part in new groups and events.

Another important shift of values should take place in relation to a **healthy lifestyle**, which also means that people should start to take more individual responsibility for their own health. Physical and social activity is an important part of healthy life. There has been a change in people's minds towards a healthy lifestyle in recent years, but some trends are still very worrying (i.e. the statistics of alcoholism and other types of risk behaviour).

10. The CSOs that engage older people are often run by the older people themselves. Therefore, some **mechanisms could be created that support them in organisational and technical matters**, e.g. by providing help in accounting, fulfilling bureaucratic requirements, improve their financial sustainability, but also in writing and submitting a project. Currently, there are

maakondlikud arenduskeskused [Regional development centres] at county level whose aim is to consult also CSOs. Their tasks, however, are rather general consultancy and do not involve that individual approach.

Running an organisation requires good ICT skills in which older people are often not very strong. In addition, public and private services are increasingly TV- or ICT-based due to their outreach, cost effectiveness and high level personalisation options. In relation to that, **ICT/computer courses for older people should be continuously supported and/or there should be support persons who could help the elderly in ICT matters.**

11. The project-based funding of CSOs – also those who provide services and/or who are long-term strategic partners to the public sector – is an obstacle that creates excessive bureaucracy and prevents organisations from focusing on their main mission. Almost all organisations engaged in the study mentioned financial sustainability and short-term funding as one of their main problems. This is especially difficult to handle for CSOs that represent or deal with vulnerable groups (including the elderly). Therefore, **the financing of CSOs should be better regulated** – there should be minimum requirements for funding practices and a common understanding of principles and definitions. In addition, long-term funding/cooperation contracts should be encouraged. There are several good initiatives already that should be further implemented by the public sector organisations. For example, there is a manual *Guidelines for funding the CSOs* and trainings for public sector officials based on that. However, since the manual has been voluntary until now for public sector organisations, its impact is insufficient.
12. If the elderly provide informal care to others they can easily become those who need help. It happens if people do not know how to separate a client's concern from their private one. The evidence from the interviews and from focus group suggests that elderly volunteers (and very likely all volunteers in general) need **special attention and support** when doing work related to informal care. Therefore, the organisations that use elderly volunteers should provide counselling and therapy for them in order to prevent them from burning out.
13. When planning any solutions for the elderly, it is advisable **to engage them actively into the planning and co-creation process**. This is one of the most effective ways of keeping them active, independent and making them feel that their contribution is real. The ready-made solutions (related to services, products, events, etc.) encourage passivity and may ignore the real needs and expectations of the target group. It is related to the general question of political culture at all levels of society and the question of how substantial is the engagement of different stakeholders/target group into the policymaking process, service design or organisation of a simple event.

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