

Arizona Grantmakers Forum
March 22, 2007

Engaging Baby Boomers in the Nonprofit Sector

Speaker Presentations

Transforming Baby Boomer Potential into Nonprofit Gold

Arizona Grantmakers Forum

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Who are the 50+?

50+ Adults Represent Three Distinct Generations

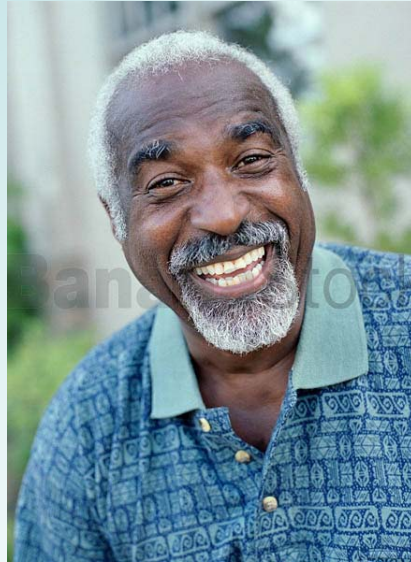


G. I. Generation 1901-1924

- Bear any burden, pay any price
- Loyal to the organization
- Strong sense of civic obligation
- Show respect for authority
- View retirement as time of rest and leisure

Silent Generation 1925-1945

- “Organizational Man”
- Risk adverse
- Optimistic about the future
- First divorce generation
- Fewer in number than G.I. or Boomers
- Seeking an active retirement (travel, golf, learning)



Baby Boomers 1946-1964

- Less tied to tradition
- More individualistic
- Social cause oriented
- Less trusting of authority
- Better educated and healthier than previous generations
- See retirement as a journey with different stages; more likely to work past traditional retirement age



Traditional Volunteering Shaped by the G.I. Generation

- Regular, ongoing commitment
- Recognition; based on hours
- Highly defined roles
- Hands-on, repetitive and routine tasks
- Lower skills
- Close supervision



“Boomers” Have Different Preferences!



- Choice, choice, choice!
- Flexibility
- Meaningful work
- Connection
- Personal Development

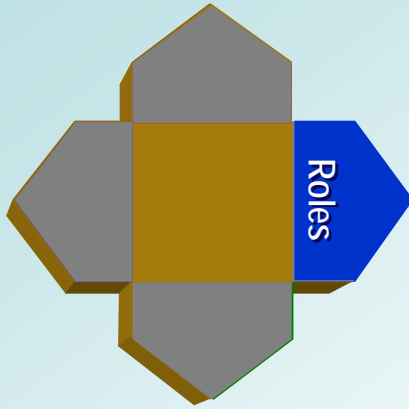
What Does This Mean for Non-Profits?

- **Creating a menu of unpaid and paid opportunities**
- **Tailoring marketing and recruitment strategies**
- **Finding the right fit-balancing organizational needs with individual interests**
- **Supporting and empowering an expanded workforce rather than top-down management**

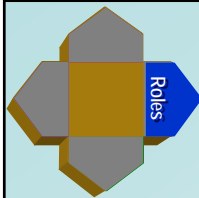


**4 Strategies
for Creating
Compelling
Opportunities
for 50+ Adults**

Strategy #1

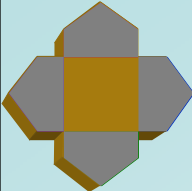


Expand the types
of roles you offer



Types of Volunteer Roles

- **Direct Client Service** (*e.g. mentoring, friendly visiting*)
- **Indirect Client Service** (*e.g. sorting donations, house repair*)
- **Advocacy** (*e.g. writing letters, public speaking*)
- **Organizational Administrative** (*e.g. filing, data input*)
- **Organizational Capacity-Building** (*e.g. accountant, researcher*)
- **Organizational Managerial** (*e.g. project leader, committee chair*)
- **Organizational Governance** (*e.g. board member*)



Roles

Organizationally-defined	Individual-defined
<ul style="list-style-type: none">• Created by staff with no input from individuals• Individuals recruited to fill existing slots	<ul style="list-style-type: none">• Starts with individual's particular interests & skills• Opportunity is created to utilize those unique qualities



Strategy #2

Offer opportunities with varying time commitments

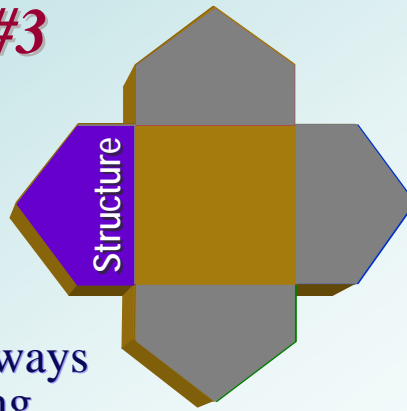
Time Commitment				
	One-time	Occasional	Short-term projects	Regular, Ongoing
Direct Client Service				
Indirect Client Service				
Advocacy				
Organizational Administrative				
Organizational Capacity Building				
Organizational Management				
Organizational Governance				



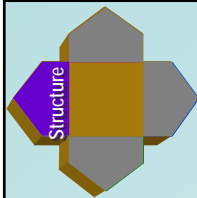
Making regular ongoing opportunities more flexible

- Be a sub
- Come when called
- Job Sharing
- Taking turns
- Breaking it down

Strategy #3



Explore other ways
of structuring
volunteer roles



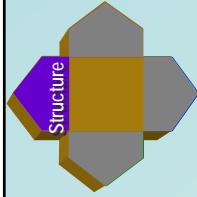
Teams

Staff-managed teams

- Individuals working together on a task
- Follow directions of an outside supervisor

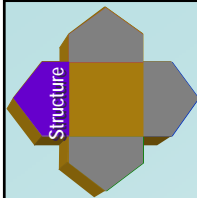
Self-directed teams

- Individuals working together interdependently on an entire process
- Take on many functions traditionally done by a supervisor



Pro-bono consultant programs

- Volunteer-defined roles for high skilled volunteers
- Examples: SCORE, Executive Service Corps
- Connect with an existing program or create your own internal one.

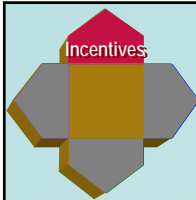
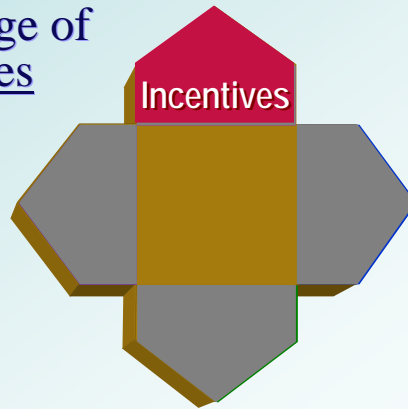


Telecommuting

- Working virtually to:
 - Complete tasks offsite
 - Provide direct client service
 - Build organizational infrastructure

Strategy #4

Offer a range of
incentives

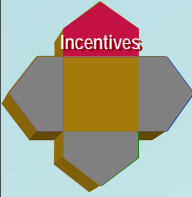


A recent poll determined:

54% of volunteers and 48% of non-volunteers would give 15-hours a week if: provided compensation such as reduced drug costs, educational credits, small monthly stipends

50+ workforce could be doubled through small inducements such as: Learning new things, making new friends, putting career skills to use





Extrinsic Incentives

- **Recognition**
- **Token gifts**
- **Major gifts**
- **Expense reimbursement**
- **Cash-equivalent benefits**
- **Stipends**
- **Part or full time employment**

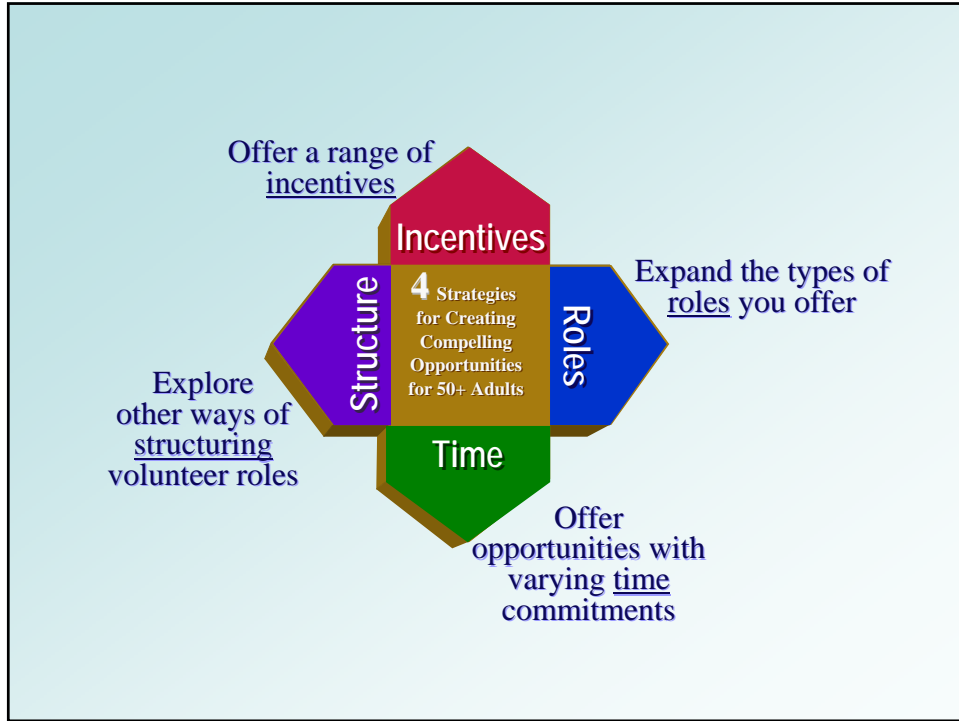


Intrinsic Incentives

- Learning new things
- Using existing skills
- Feeling healthy and vital
- Building new relationships
- Making a difference
- Feeling purposeful

Engaging Baby Boomers in the Nonprofit Sector

Speaker Presentations



THE VIRGINIA G. PIPER CHARITABLE TRUST


Arizona Grantmakers Forum

Engaging Baby Boomers

The Virginia G. Piper Charitable Trust
March 22, 2007

THE VIRGINIA G. PIPER CHARITABLE TRUST

Elements of Successful Aging



- 1. Prevention of disease and disability**
- 2. Attainment of peak physical and psychological functioning**
- 3. Participation in rewarding and productive activities**

Successful Aging, Rowe and Kahn

What do Retirees Want?

- Continued involvement, giving back
- Being part of something larger
- Freedom and control over their time
- Meaningful relationships



Source: Recently Retired – Margaret Mark for Civic Ventures, 2004.

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Boomer Retirement Plans

- 65 % plan to work in paid or unpaid positions – full or part-time
- Want to connect, have a sense of purpose, additional income, improve quality of life
- 48% feel it will be difficult to find “good work”
- 71% plan to volunteer – to help people, connect to community
- 70% report dissatisfaction with volunteer experience

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Rewarding/Productive Activities

- **Next Chapter Centers** – four projects to provide meaningful options for people planning to or having retired
 - Tempe Connections
 - Scottsdale Boomerz
 - Mesa Life Options
 - Chandler Boomerang
- **Experience Corps** – two projects that train older adults to assist at-risk readers
- **Career Transition Center** – Gateway Community College planning grant

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Lessons Learned

- Older adults are seeking active, engaged life of learning, service and community connections – paid and unpaid, full or part time
- Business and nonprofit organizations unprepared for this new worker/volunteer - requires time, commitment and a different way of doing business
- Marketing/branding is critical
- Institutional change is complex

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Value of Boomers to Nonprofits

- Experienced
- Desire to help community – can help fulfill agency mission
- Flexible
- Provide more management capacity
- Potential mentors to staff
- Volunteers often turn into donors

The New Face of Aging



Are you prepared??

- Leadership committed to creating **meaningful** positions that provide personal fulfillment?
- Open to change?
- Recruitment strategies – appropriate messages?
- Role of volunteer coordinator integral?
- Staff resistance?
- Flexible opportunities – project related, part-time, seasonal, virtual
- Benefits? – health insurance, stipends, expenses, training, educational credit, honorarium
- Value recognition – clear job descriptions, ability to shape projects, business cards?

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Piper Trust Interest Older Adults

- Increasing nonprofit capacity to utilize older adults in meaningful ways to improve our community
- Encouraging institutional change to incorporate appropriate programs for this “new” older adult
- Developing methods for older adults to retrain to serve in the healthcare, education and social services arena

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● ● ● | Engaging Baby Boomers in
the Nonprofit Sector

Jacky Alling, Arizona Community Foundation
<http://www.azfoundation.org>

● ● ● | The first of the 7.7 million baby boomers
begin turning 60 this year



How do we help
society to
achieve the
greatest return
on experience?



Background

- National research shows that tens of millions of people over 60 are looking to make a difference in their community.
- Baby Boomers want to “age in place” and research shows they are looking to make a difference in their communities.

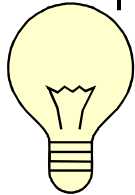


•Atlantic Philanthropies’ US Program for Aging

- ACF is one of 30 Community Foundations selected to receive grants totaling \$750,000 for local assessments.
- Subsequent grants providing millions of dollars of support for the planning and implementation of new programs.



Why this makes sense?



- Arizona's population is aging – those 60 and over will triple in number by 2050.
- Strong efforts to tap the experience of boomers already in place...



Good Work for Arizona Partnership

- Alliance of Arizona Nonprofits
- Arizona Community Foundation
- Arizona Grantmakers' Forum
- Governor's Council on Aging
- Maricopa Community College Center for Civic Participation
- Virginia G. Piper Trust

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Engaging Baby Boomers in the Nonprofit Sector

Speaker Presentations

Tuesday Feb 27th	TBD	Mesa	Mesa Downtown Campus 145 N Centennial Way Mesa, AZ 85201	Next Chapter Projects	Susan, Jacky	Alberto Bernie	Ruth
Wednesday Feb 28th	9:30-11:30	Phoenix	Phoenix Southern Arizona	Town Hall	Susan	Alberto Bernie	Ruth
Wednesday March 7th	6-8 PM	Concho	Concho Activity Center 3700 Center Highway 61 Concho, AZ	NEW OPPORTUNITIES Flexible, Meaningful, Voluntary Unpaid work	Susan, Jacky	Alberto Bernie	Ruth
Friday March 16th	10:11:30 AM	Parker	Parker Senior Center 1217 Laguna Parker, AZ	Coregulation Mutual Aid Facilitate Life Cycle Transitions	Susan, Melanie	Alberto Bernie	Ruth
Tuesday March 20	TBD	Phoenix	Phoenix Pro Neighborhood Location TBD	Town Hall	Susan, Jacky	Alberto Bernie	Ruth
Thursday March 22nd	11:30-1:30	Phoenix	Phoenix Central Library Pulliam Auditorium	AZ Grantmakers Forum	Susan, Jacky	Alberto Bernie	Ruth
Friday March 23rd	12-1	Ajo	Ajo	ENABLERS Health Care Economic Security Lifelong Education/Learning Transposition	CFAA	Susan, Jacky	Alberto Bernie
Friday March 23rd	1-2:30	Paradise Valley	Paradise Valley Community Center 17422 N. Phoenix	INDIVIDUALS	GACA	Susan, Melanie	Alberto Bernie
Monday March 26th	2-4:00PM	Phoenix	Golden Gate Community Center		CFAA	Susan	Alberto Bernie
Tuesday March 27	6-8PM	Prescott	Yavapai College Green Room 1100 E Sheldon St. Prescott, AZ 86301		CFAA	Susan, Jacky	Alberto Bernie



Doing Well by Doing Good..

For older Americans, there are physical and mental health benefits to being engaged in paid and unpaid meaningful activities:

- mental health benefits - socially connected
- serve others as well, filling vital roles that benefit their communities and the state as a whole.
- volunteering is a “virtuous cycle” -- that is, the more often baby boomers volunteer, the more likely they are to continue doing so or be civically engaged in other ways.

New Face of Work Survey

- Nearly Half of all Americans age 50-70 want to be involved in work – paid or volunteer that helps others
(Health, Education and Social Services)
- Second careers in the retirement years are about people, purpose and community
- Many think it won't be easy to find second careers doing good work and strongly support public policy changes to remove obstacles



Opportunities for Arizona Nonprofits

- Sheer numbers 55+ = >26% of AZ
- Recognize engaged, experienced adults as a philanthropic resource
- Virtual volunteers/employees
- Develop jobs from volunteer posts
- Leadership transitions
- Understand the need for staff training on volunteer management



Challenges for Arizona Nonprofits

- Volunteer management needs to be infused throughout the entire managerial culture
- Disparities among organizations – size/place matters
- Limited thinking – licking envelopes
- Need for training and assessment tools across the board for staff and volunteers



Research can be used to strengthen marketing and recruitment strategies, and to help build the knowledge and capacity of volunteer management organizations. Use research to:

Gain insight into who is and is not volunteering, and what people are looking for from a volunteering experience; Identify trends in volunteer demographics to help target volunteer recruitment and support strategies;

Understand how changes in the volunteer climate can impact program strategies and policies;

To help justify the need for targeted services and the resources to deliver those services; and

To make more informed decisions about resource allocation (including funding) and project development.

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