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Rose Community Foundation

BOOMERS LEADING CHANGE

Final Evaluation Report

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BOOMERS LEADING CHANGE

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EXECUTIVE SUMMARY

The purpose of Rose Community Foundation's Boomers Leading Change initiative was to learn more about the opportunities and challenges facing boomers in the community and to identify potential initiatives for harnessing this "experience dividend." The primary goals of the Foundation's community assessment were to:

- Present a comprehensive demographic overview of the 55 to 65 population in the Denver metropolitan area (Adams, Arapahoe, Broomfield, Denver, Douglas and Jefferson counties)
- Achieve a baseline understanding of opportunities for adults over 55 to remain engaged in community life through employment, service and lifelong learning
- Develop an understanding of the interests and desires of individuals age 55 to 65 concerning their future participation in the workforce, involvement in community service and pursuit of training or education
- Identify up to four community improvement initiatives to address the interests, needs and opportunities of adults over 55

Methodology

Rose Community Foundation contracted with JVA Consulting, LLC (JVA), a Colorado-based research and consulting firm, to conduct the community assessment. JVA used the following methods:

- Conduct a comprehensive literature review and demographic research of 55 to 64 year olds
- Develop and administer three Web-based surveys to gather information about opportunities in the areas of employment, service and lifelong learning
- Develop and administer a Web-based and paper/pencil survey for adults age 55 to 65 regarding their current activities and future plans regarding employment, service and lifelong learning
- Conduct nearly 60 telephone and in-person interviews with key informant community stakeholders
- Conduct 14 focus groups with adults age 55 to 65
- Conduct a 9NEWS telephone survey of 250 adults age 55 to 65
- Engage a Community Advisory Committee in the assessment process

Key Findings

The community assessment identified valuable findings, which will help Rose Community Foundation identify future initiatives. Below is a brief overview of these key findings.

1. **Boomers want to remain engaged through work, service and learning.**
However, the degree of engagement in these areas is often influenced by income status, gender and/or race/ethnicity.
2. **Boomers anticipate significant changes in their work life.**
3. Several factors influence boomers' future plans. **Healthcare and retirement benefits, along with involvement with others and work that is meaningful, are the most important factors.** There were no differences in gender, ethnicity or income earner status in these findings.
4. Research showed that the **top motivations for volunteering are: passion for a cause, helping the community, feeling productive and having meaning in their work.**
5. **There is a disconnect between what service organizations report in how they utilize boomer volunteers and what boomers report in how they are used.**
Eighty-three percent of service organizations report they are motivated to engage boomer volunteers; 78% say they match individuals' interest, skills and experience with volunteer activities, and 61% state they have the infrastructure to engage/support boomer volunteers. However, while survey respondents and focus group participants overall reported having successful volunteer experiences, others reported that volunteer coordinators are sometimes unskilled in using volunteers, that volunteers' expertise is not used effectively, and that they were sometimes overworked or felt unappreciated.
6. **There is a diversity of issues that capture boomer interest.** Survey respondents were asked to rank 20 possible future areas for civic engagement; each area garnered at least 16% interest.
7. **65% of all boomers report wanting to participate in lifelong learning.**
Comparisons by income level show that interest in enrichment and lifelong learning, lectures/symposiums and workshops/seminars increases with income

level, while interest in job training programs is higher for respondents in lower income brackets. While many institutions are aware of the growing numbers of older adults yearning for enrichment classes and Denver boasts many learning models, it is critical to ensure that the need for job training is not forgotten.

8. **There is no one place where boomers will go to learn more about future civic engagement.** The survey and focus group results indicate that boomers will seek out a variety of sources, including friends/social networks, online/Internet, churches, professional contacts, colleges, nonprofit organizations, newspapers and workforce centers.

The assessment identified several interesting opportunities for program development. Initial concepts include:

1. **A clearinghouse or network of resource centers.** A key theme that emerged from the research is that boomers connect to resources and information through a variety of sources, including the Internet, but that much information is derived from personal and professional networks. This may include community groups, churches, professional associations and others. Most reported that they felt more comfortable accessing information about what to do next through sources with which they were already familiar. One part of this effort would be to offer a series of educational classes or other kinds of programs that would provide individuals with information they need to make educated decisions about opportunities available to them, especially in employment and community service.
2. **A healthcare initiative.** Across socioeconomic groups, gender, race/ethnicity and other factors, two common themes emerged: 1) access to healthcare benefits is a big determining factor that will influence what boomers feel they can do next; 2) access to healthcare is an issue that boomers may be able to influence because of their sheer numbers. There is interest in further exploring potential models for tying healthcare benefits to volunteerism and part-time, flexible work, as well as harnessing the passion and experience of boomers into longer-term, more comprehensive healthcare reform.

3. **A capacity building initiative.** Another key theme that emerged from the assessment was the disconnect between the organizations that typically offer opportunities for volunteerism and community service, and the boomers who want to use their skills and experience to benefit their communities. This was true not only in nonprofit organizations, but also in government agencies, work places and institutions of higher education, which may want boomers to enroll in their programs but have bureaucratic requirements that boomers resist. Future initiatives may need to look at the policies, practices and systems that discourage boomers from future meaningful civic participation and build the capacity of community organizations, work places and institutions to meaningfully engage boomers in the next phase of their lives.
4. **Career transition training.** In response to the significant percentage of middle- and low-income boomers who intend to continue earning a living beyond age 65, it will be important to create opportunities for them to become trained in different job skills, learn how to start and operate a business, or earn income through self-employment. Many boomers foresee leaving full-time employment to work part time, but they will still need to earn sufficient income to meet living expenses. Many of the part-time opportunities currently available to older adults are low-skill jobs that pay poorly. A career transition training initiative would be designed to train 55-plus adults for jobs that offer pay and benefits commensurate with higher-level skills and/or professional qualifications. Training in small business startups and self-employment are additional options to address needs for income and flexibility.

Conclusion

Rose Community Foundation will work with JVA to prepare a large public release of the assessment findings, culminating with The Metro Denver Boomers Leading Change Forum on June 28, 2007. The Foundation expects to engage its Community Advisory Committee in a Phase II of the Boomers Leading Change initiative later in 2007, further developing concrete programs and projects that respond to the data developed in Phase I.

I. INTRODUCTION

*"In the '60s, we made changes. . . . We can't sit back now. We didn't then
and we're not going to now."*
Denver Boomer

The Denver metropolitan area has been a magnet for the baby boom generation since John Denver first plucked his guitar to *Rocky Mountain High* in 1973. When boomers reminisce about defining moments in their lives, it often includes their involvement with one or more social movements—civil rights, feminism, anti-war protests, the sexual revolution and the environmental movement. Denver was home to the Chicano movement of the '60s, and many boomers explain how that specific campaign shaped their lives today. The majority of Colorado's population lives along the Front Range, making it an opportune geographic area to study trends among baby boomers. By 2010, almost 300,000 people age 55-64 will be living in the Denver metro area. The sheer size of this demographic is staggering, particularly when one considers the potential opportunities for engaging (or reengaging) this historically activist-minded group in the community through work, service and learning. As one Mile High boomer said:

"We have significant numbers and are in a position to lead change."

The purpose of Rose Community Foundation's Boomers Leading Change initiative was to learn more about the opportunities and challenges facing boomers in the community and to identify potential initiatives for harnessing this "experience dividend." Although the initiative was called Boomers Leading Change, the actual study looked at 55- to 65-year-olds with the assumption that their attitudes and beliefs would provide insight with overall boomers.

THE COMMUNITY EXPERIENCE PARTNERSHIP

Rose Community Foundation was one of 30 community foundations across the U.S. selected to take part in the Community Experience Partnership, a long-term initiative to mobilize the experience, talents and skills of experienced adults to benefit their communities, funded by The Atlantic Philanthropies. Through mid-2007, these foundations conducted community assessments to identify the needs and opportunities for experienced adults to remain engaged in community life, and the interests and motivations of experienced adults to continue contributing to their communities through work, service and learning. This study was funded by a grant from The Atlantic Philanthropies as well as funding from Rose Community Foundation.

Specific research questions included:

- How are nonprofits and businesses prepared to utilize the leadership, talent and expertise embedded in the life and career experience of Denver-area residents who are approaching the “age of retirement?”
- What do boomers want to “do next?”
- What factors influence boomers’ future plans?

In order to answer these questions, Rose Community Foundation proposed the following goals for its Boomers Leading Change comprehensive community assessment.

Goal 1: Present a comprehensive demographic overview of the 55-65 population in the Denver metropolitan area (Adams, Arapahoe, Broomfield, Denver, Douglas and Jefferson counties).

Goal 2: Achieve a baseline understanding of opportunities for adults age 55-65 to remain engaged in community life through employment, service and lifelong learning.

- Identify existing or potential opportunities to expand options for adults 55 to 65 to remain involved in their communities and the economy.

Goal 3: Develop an understanding of the interests and desires of individuals age 55 to 65 concerning their future participation in the workforce, involvement in community service and pursuit of training or education.

- Identify key trends in how adults 55 to 65 envision their future employment, retirement and amount of time they intend to devote to gainful employment.
- Investigate the level of interest adults have in devoting time to community service.
- Explore interests and motivations of adults in seeking further education and/or training for purposes related to employment-related skills, leadership or volunteer activities and personal enrichment.

Goal 4: Identify up to four community improvement initiatives that could benefit from experienced adults over 55, which also fall within the scope of interests of the 55-65 population to address.

Rose Community Foundation contracted with JVA Consulting, LLC (JVA), a Colorado-based research and consulting firm, to conduct this comprehensive community needs assessment. This report summarizes the research of the community needs assessment during early

2007. The report is divided into six sections. It includes an overview of the research methodology, literature review on boomers and civic engagement, and a demographic profile of the Denver metro area, as well as provides a vivid picture of the desires, opportunities and obstacles facing Denver-area residents age 55 to 65 as they enter the next phase in their lives. As discussed in Section II: Methodology, the research draws on quantitative and qualitative research, analyzing surveys, listening to stories of adults and drawing out key themes as individuals grapple with what to do next.

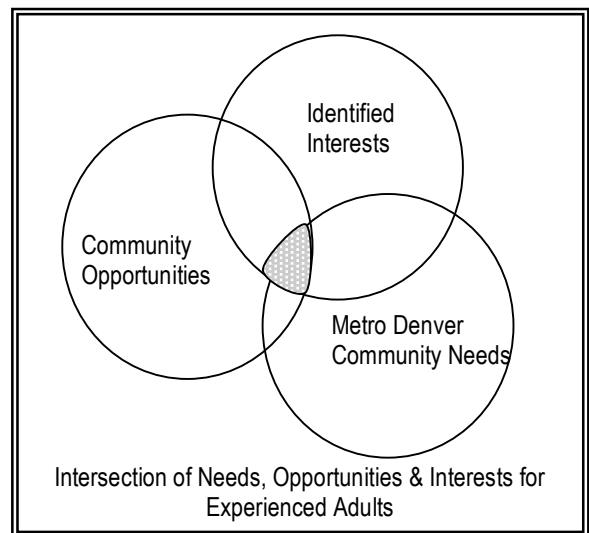
One focus group boomer summarized the general consensus: *“I want my life to have purpose.”* The following report will delve more deeply into what exactly that means for different Denver-metro residents.

II. METHODOLOGY

The purpose of the assessment was to identify the attitudes, perceptions, needs and preferences of those age 55 to 65 in the Denver metro area, identify some of the pressing needs in this community, and to identify potential areas of overlap to shape future community initiatives. *It is important to note that although the term “baby boomer” often represents people born from the mid-1940s to the mid-1960s, the research and this report focus strictly on 55- to 65-year-olds. The report uses the term “boomers” to describe this age group.*

JVA selected **data collection** methods that would simultaneously:

- Obtain data from a large sampling of the target population within the Denver metro area about the needs, strengths, desires and attitudes of adults age 55-65 as they contemplate the next phase of their lives. Stratified samplings methods were used to maximize the representativeness of the sample.
- Delve deeper into issues and motivations of boomers through telephone polling, focus groups and stakeholder interviews
- Use multiple sources, including surveys, focus groups and interviews, to identify community needs and also work, service and learning opportunities for adults age 55-65 in the Denver metro area



The community assessment included the following strategies:

A comprehensive literature review of Web sites, published reports, peer-reviewed journal articles, books and other sources about community engagement of experienced adults through employment, service and learning, as well as policies and practices that limit opportunities for participation. An annotated bibliography is found in Appendix A.

Demographic research using U.S. Census and Colorado Department of Local Affairs data to create a clear picture of adults age 55 to 64 (the age range captured in the census data) living in the six-county metro area. Demographic variables included: gender, ethnicity and race; household income; education level; and health insurance

status. Unless referring to the census data, all other research for this project reflects the 55- to 65-year-old age range.

Administration of three Web-based surveys to gather information about opportunities in key areas:

- **Employment:** To assess employment opportunities for experienced adults, JVA surveyed various public and private employers, as well as others having insight into the issue such as chambers of commerce and county workforce centers.
- **Service:** To gain information about service opportunities for experienced adults, JVA administered Web-based surveys to organizations such as civic groups, nonprofit organizations, agencies serving older adults, faith-based organizations, GLBT groups and other diverse community organizations.
- **Lifelong learning:** To explore various learning opportunities (degree programs, classes, distance learning, job training and certification programs, etc.) for adults, JVA administered surveys to the institutes of higher education in the Denver metro area as well as alternative institutions offering lifelong learning opportunities.

Over 400 organizations responded to these surveys. All survey instruments are found in Appendix B.

Administration of a Web-based and paper/pencil survey (including a Spanish-language version) for adults age 55 to 65. JVA developed a survey that was placed on www.coloradoboomers.com, a Web site developed specifically for this purpose. This survey was also administered in paper-pencil format at community organizations, churches and job fairs to obtain responses from a more diverse population than might respond to an online survey. A total of 1,021 people responded to the survey (754 online and 267 paper/pencil). In the analysis, 172 were eliminated from the sample because they were outside the age range. The final sample analyzed included 772 respondents.

One limitation of the needs assessment was the absence of a randomized sampling plan. However, many efforts were made to ensure that the sample was as **representative** of the population of the six-county Denver area as possible. Such methods include using a stratified sampling plan that included: “snowball” sampling, (a technique to find subjects, where each respondent gives the researcher the name of another participant who in turn provides the name of another participant, and so on) and paper/pencil survey administered to diverse participants in communities of color. In

addition, individual survey responses were statistically weighted. This means that each respondent's final survey weight was adjusted for non-response and post-stratified by race/ethnicity and income level to match census data for each county in the Denver metro area. While weighting the responses allowed for comparisons between the predominate ethnic groups in the Denver Metro Area, including white, black/African American and Hispanic/Latino, number of respondents for other ethnic groups such as Asian, Hawaiian/Pacific Islander, and Native American/Alaskan Native were too low to conduct separate analyses of survey results for these groups.

Qualitative methods, such as interviews and focus groups were used to gather input from diverse communities of color, however future studies may want to explore cultural-specific issues in greater depth for 55-65 year olds in DMA.

Through a partnership with 9NEWS, an NBC television news affiliate, administration of a Survey USA market research telephone survey of 250 adults age 55-65 about their plans and attitudes regarding employment, service and learning. This was designed to obtain additional information from a broader sample across the Denver metro area.

Nearly 60 telephone and in-person interviews with key informant community stakeholders. Stakeholders included either individuals from the target age group or individuals who had insight into local opportunities for adults age 55 to 65 in employment, service and learning.

Fourteen focus groups with adults age 55 to 65, drawing upon the input of the Community Advisory Committee to identify target groups that should be reached. Groups reached included teachers, nurses, small business owners, union members, African Americans, Latinos and members of the GLBT community. The focus group and interview protocols are found in Appendix C.

Engagement of a Community Advisory Committee (CAC) in the needs assessment process. The CAC members were selected by Rose Community Foundation to encompass a diverse group of opinion leaders and change agents from various segments of the community. JVA attended and co-facilitated three CAC meetings in order to gather information about the needs, interests, opportunities and challenges for engaging adults age 55 to 65 as part of the community assessment process, to obtain

their input into an outreach plan, and to suggest key themes for potential initiatives to be explored in the assessment process. A list of CAC members is found in the Appendices.

Data Analysis

Quantitative data from the Web-based surveys were exported into a Microsoft Excel file. Paper/pencil survey data were also entered into an Excel file, and all data were merged, cleaned and exported to the Statistical Package for Social Sciences (SPSS) software for analysis. Analyses included frequencies, descriptive analyses and significance testing using independent t-tests and ANOVA and multivariate statistics.

All qualitative data from the focus groups and interviews were recorded and transcribed, and transcriptions were analyzed using coding and thematic pattern matching.

Evaluators synthesized results from the quantitative and qualitative data, as well as the demographic analysis, SURVEY USA findings and literature review. By “triangulating” data from multiple sources, evaluators gained a fuller picture of needs of 55- to 65-year-olds in the community as they decide what to do “next” and the opportunities available to them.

III. SUMMARY OF LITERATURE AND MODELS ON CIVIC ENGAGEMENT

JVA conducted a comprehensive literature review of published reports, peer-reviewed journal articles, books, Web sites, news articles and other sources of information relating to boomers' employment, service and learning. JVA examined local, national and international sources to learn about current issues and themes relevant to Rose Community Foundation's Boomers Leading Change initiative. This background helped inform a more focused research methodology, specifically the development of survey, interview and focus group questions. JVA also researched emerging models designed to engage adults 55+ in the areas of work, service and learning in the Denver area. An overview of these programs and a selection of articles are synthesized and presented in the Annotated Bibliography as Appendix A.

National studies on boomers echo key themes such as the need to redefine "retirement," the challenges employers will face with the future exodus of older adults from the workforce, the general desire of boomers to remain engaged, and their strong interest to contribute their knowledge and skills through work and volunteering opportunities. Below is a brief overview of the research.

Employment and retirement The vast majority of boomers say they expect to work in retirement. AARP's recent research on 1,200 boomers' expectations for retirement found that 80% plan to work in some capacity during their retirement years.¹ Over half expect to work part time, and 15% plan to start their own business. However, the study reported that numerous economic factors will impact whether workers remain in the labor force later in life, including:

- Inadequate retirement savings
- Stagnating pension coverage that leaves many workers with little or no pension protection. Only about half of private industry employees participate in an employer-provided pension plan
- Cuts in retiree health benefits, making early retirement financially unfeasible
- The increase in the age of eligibility for full Social Security benefits and reduction in the size of the age 62 benefit

¹ *Breaking the silver ceiling: A new generation of older Americans redefining the new rules of the workplace.* (2004). Congressional Testimony before the Senate Special Committee on Aging.

In addition, a telephone survey of 1,000 adults 50 to 70 years old, conducted by the MetLife Foundation and Civic Ventures in 2005, also found that most baby boomers said they will continue to work during what used to be the retirement years.² This survey reported the following:

Important factors for those planning to continue working post “retirement age”

- Staying involved with other people (59%)
- Job gives a sense of purpose (57%)
- Job provides additional income (52%)
- Job provides opportunity to help improve the quality of life in their community (48%)

Obstacles to working in retirement include:

- Declining health (53%)
- Work not fulfilling (35%)
- Family obligations (32%)
- Inflexible hours (31%)
- Can't find the right kind of work (22%)
- Inadequate pay (19%)

Attractive job characteristics The study also found that boomers would be likely to work for the following reasons: 85% want an option to work part time; 83% want a flexible work schedule; 82% will work if they could collect pension and social security without penalty; 74% for healthcare benefits; 71% for a tax break for a particular job; and 62% for training to provide new skills.

Removing obstacles that hamper work in retirement The vast majority strongly support changes to remove obstacles that hamper work in retirement: 60% strongly support giving a tax credit to older Americans who work in schools/social services; 48% strongly support increasing funding for those who go back to school or who get training to prepare for work in schools/social services; and 46% strongly support a grant or tax credit for those over age 50 who spend a year in training or are actually working in a job in public or community service.

Trends in the workplace Studies also point to three important trends that will have a dramatic impact on the American workforce: 1) the workforce and the population as a whole are aging; 2) labor shortages are projected in a growing number of sectors of the economy; and 3) many workers intend to continue to work beyond the traditional

² New Face of Work Survey. (2005). MetLife Foundation/Civic Ventures.

retirement age. Attracting and retaining mature, experienced workers will become increasingly critical to maintaining a competitive advantage in the new labor market. A study commissioned by AARP³ found:

- As baby boomers approach the traditional retirement age, many U.S. companies face a potentially significant loss of experienced talent in key roles.
- Some companies may be able to escape the talent crunch entirely if today's 50+ workers do, in fact, stay in the workforce longer than previous generations. However, some companies are already feeling the talent pinch in some positions.
- Many U.S. workers today expect and want to continue working past traditional retirement age, for both financial and personal reasons. For employers, workers 50+ represent a potentially attractive solution to near- and long-term staffing challenges if they are successful at retaining and attracting this growing pool of talent.

This study, which includes a review of research on workforce issues for 50+ adults and in-depth telephone interviews with senior human resource executive in 10 major organizations, suggests several key steps for companies to recruit and retain 50+ workers. These include inventorying current talents and defining future needs, based on an analysis of an organization's long-term business plans and modeling cost trends to understand the business case for investments needed to attract or retain 50+ workers.

Keeping baby boomers volunteering Baby boomers represent a potentially invaluable resource for the volunteer world. However, ensuring that this resource is effectively tapped means not only *recruiting*, but also *retaining* older volunteers. According to research, drawn from the Current Population Survey's volunteer supplements administered by the U.S. Census Bureau, and analyzed by the Corporation for National and Community Service (CNCS) in 2007, 32% of baby boomers are currently volunteers.⁴

CNCS also found that approximately three out of ten boomer volunteers dropped out of volunteering each year and recruitment efforts often fall short of fully replacing the volunteers who dropped out. Only about 83% of the volunteers who left were replaced with new volunteers. This is despite the fact that baby boomers in their late 40s and mid-

³ *The business case for workers age 50+: Planning for tomorrow's talent needs in today's competitive environment.* (2005). A report for AARP by Towers Perrin.

⁴ *Volunteering in America: 2007 State Trends and Rankings in Civic Life.* Corporation for National and Community Service.

50s have higher volunteer rates than past generations had at the same ages. The study notes that it is imperative that organizations understand why some boomers are choosing not to continue to volunteer. The study suggests that working and volunteering may not be substitutes for each other. It may be that work provides the social and institutional networks that present opportunities for volunteering. As work is reduced, those network and connections that lead to volunteer opportunities are either eliminated or diminished, resulting in less volunteer retention—and maybe even less overall volunteering. The authors note that it remains critical to keep volunteers engaged and suggest many ways in which to achieve this goal.

Factors influencing volunteer retention According to CNCS, three key factors influence retention rates for boomer volunteers:

- Volunteers with the highest attachment to their volunteering have the highest retention rates. For volunteers who serve 12 or more weeks per year, the retention rate is 79%, versus 53% for volunteers who serve two weeks or less per year.
- Retention is directly related to the type and nature of the volunteer activity. In general, boomers prefer professional, managerial or mentoring services, and dislike general labor.
- Retention rates are related to the ways boomers become volunteers with those who are asked to volunteer by the organization having the highest retention rates, and those asked to volunteer by their employer having the lowest.

Models of practice for engaging boomers in the community There are efforts underway across the country to engage boomers in serving their communities in the next phase of their lives. Some of these include:

RespectAbility in America: Promising practices in civic engagement among adults 55+ is a report published by the National Council on Aging (2006). The goal of this report was to learn what is working and how it is working from local organizations and community-wide initiatives experiencing success in engaging adults 55+ in service to their communities.

Seven programs were selected in 2006 as demonstrating evidence of success in one or more of the following key five outcomes:

1. Increased participation

2. Meaningful new roles
3. Improved quality of life for adults in service to their communities
4. Enhanced organizational capacity
5. Enhanced community impact

Another model for civic engagement is *The Next Chapter initiative* created by Civic Ventures, a national nonprofit organization working to help society achieve the greatest return on experience.

This initiative calls on communities to create new institutional approaches that help adults make the transition to a new productive life phase by providing support and community connections for ongoing learning, development and contribution to society. This initiative works with local communities to create places and/or programs that offer adults four key components:

- Life planning programs—help in assessing their status and strengths, exploring future possibilities and setting goals
- Meaningful engagement through work and service—opportunities to take on public service roles, through paid work and volunteer service
- Continued learning for new directions—learning options to enrich their lives and retool for new careers
- Peer and community connections—places and programs to connect with people of all ages in their community

Appendix A provides information about additional models across the country.

EMERGING MODELS IN WORK, SERVICE AND LEARNING FOR DENVER-AREA BOOMERS

Programs in the Denver area are actively seeking to engage boomers. Here is a brief overview of some promising models:

University of Denver—VIVA program (Vibrant, Intellectually Vigorous Adults!) As a program of the Osher Lifelong Learning Institute, VIVA! was created for adults age 55+ who wish to pursue lifelong learning in the company of like-minded peers. VIVA! provides a unique curriculum designed by the members themselves. VIVA! members select the topics and share their expertise and interests while serving as teachers and learners. VIVA! meets for three quarters, each lasting eight weeks.

The Denver Foundation's Hope for Generations was created in 2002 when a group of individuals realized that the income they were receiving from their Social Security payments was more than they needed to put food on the table. They also recognized that children make up the largest segment of society living in poverty and decided to pool their Social Security income and other charitable contributions to help these children. Working with The Denver Foundation, contributions from donors are pooled and used to make grants to organizations serving children in their early childhood years. A board of advisors makes decisions on which organizations receive funding. Donors meet periodically to share ideas and to hear about the differences their contributions have made in the lives of needy children and seniors.

Legacy Denver is a program of Denver Metro Chamber Foundation. Young executives from all sectors (government, corporate and nonprofit) apply to participate in this competitive program, which runs for six months and includes monthly luncheon meetings that allow a small cohort of six to seven young executives to meet with the retired-age volunteer executives. Boomer-aged executives provide mentoring to younger professionals and benefit from sharing their expertise with the next generation.

IV. DEMOGRAPHICS OF THE SIX-COUNTY DENVER REGION

Rose Community Foundation focused its community assessment on the 55-to-65 age range in the six-county Denver metro area, which includes Adams, Arapahoe, Broomfield, Denver, Douglas and Jefferson counties. One challenge in gathering this information is the fact that the census did not separate out Broomfield as a county before the 2000 census. (Its status as a separate county came after the 2000 census.)

Broomfield numbers are counted in the numbers for Denver, Jefferson, Adams, Boulder and Weld counties. In addition, the census also collects data in a 55-to-64 age range, although the focus of the research was on the 55-to-65 age range. All demographic data refers to the 55-to-64 age range.

Six County Denver Metro Area



Map prepared by State Demography Office

The number of adults age 55 to 64 in Colorado equals 337,986. In 2000, there were 163,905 adults age 55 to 64 living in the six-county Denver metro area (almost half of the total number of 55- to 64-year-olds in the state). The number of adults age 55 to 64 accounts for 8% of the

area's total population, a proportion similar to the national average (9% of the nation's total population was 55 to 64). Of those, 79,888 were male and 84,017 were female.

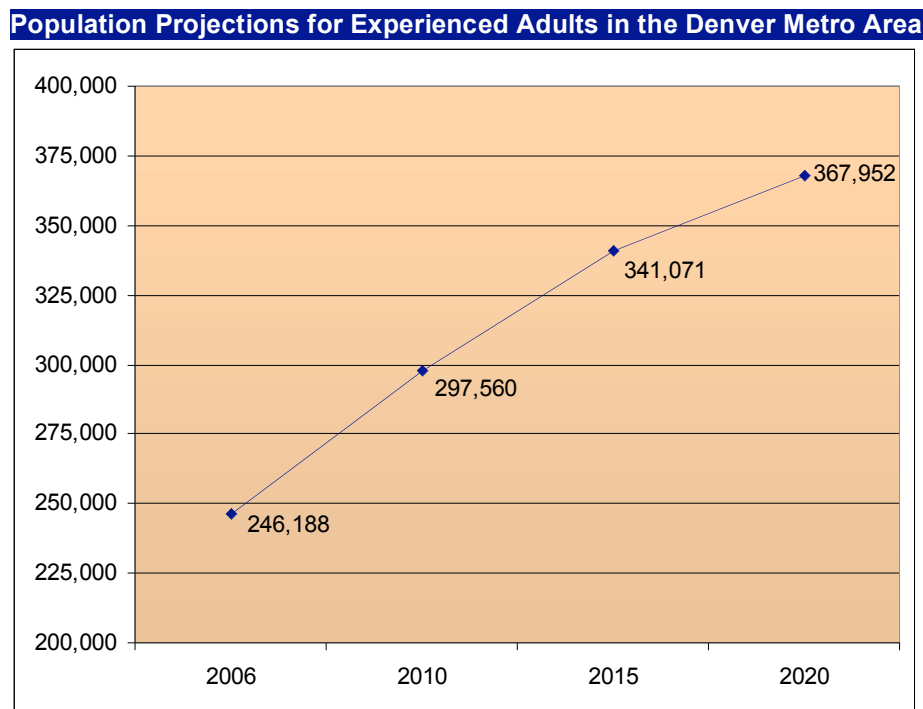
Table 1. Adults by age in metro Denver

Adults age 55 to 64 in the Denver Metro Area	
Total Population	163,905
Male	79,888
Female	84,017

Source: U.S. Census Bureau, Census 2000

The population of adults age 55 to 64 in the Denver metro area is projected to increase to nearly 300,000 by 2010.

Figure 1. Population projections



Source: Colorado State Demography Office, Department of Local Affairs, 2000

Race/ethnicity The U.S. Census Bureau views race and ethnicity as two separate concepts and, therefore, Hispanics may be of any race or races.⁵ The census offers two

⁵ Starting with Census 2000, several changes were implemented in the way the U.S. Census Bureau asked race and ethnicity questions. First, respondents had the option of selecting one or more race categories to indicate their racial identities. Previously, they were only allowed to select one race. Second, the "Asian and

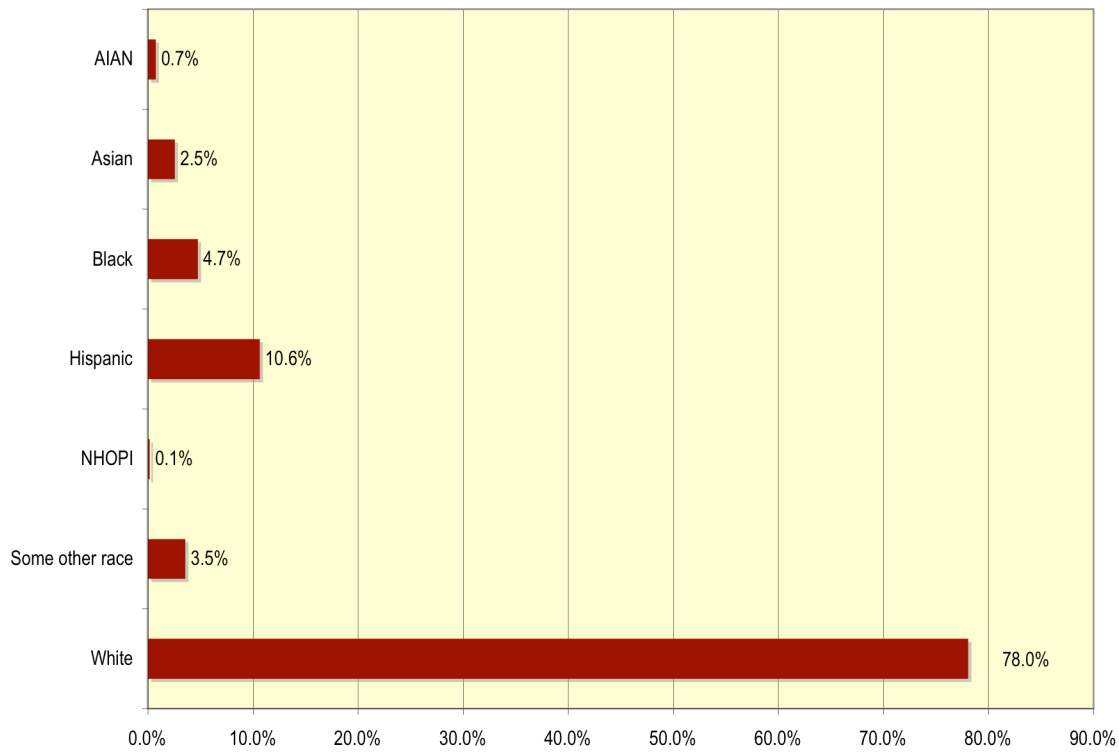
ethnicity categories: “Hispanic or Latino” and “Not Hispanic or Latino.” The following graphs and tables include both race and ethnicity data together using the following categories:

- Black or African American, not Hispanic or Latino (Black)
- American Indian and Alaska Native (AIAN), not Hispanic or Latino
- Asian, not Hispanic or Latino (Asian)
- Native Hawaiian and Other Pacific Islander (NHOPI), not Hispanic or Latino
- Hispanic or Latino origin (Hispanic)
- White, not Hispanic or Latino (White)
- Some other race, not Hispanic or Latino (SOR)

As shown in the chart below, in 2000, the large majority of adults age 55 to 64 in the Denver metro area were white, not Hispanic or Latino. Minorities (black, Asian, Native Hawaiian and Other Pacific Islander, and Hispanic or Latino) accounted for 19% of the target population.

Pacific Islander” race category was separated into two groups, “Asian” and “Native Hawaiian and Other Pacific Islander.”

Figure 2. Ages 55 to 64 population by ethnicity



Marital status A greater percentage of adults age 55 to 64 are currently married with a present spouse than not. However, Denver is the only county where being married with an absent spouse is more prevalent, with 31,287 married couples living without a present spouse and only 20,180 living with a present spouse. Within each county, it is more likely that an adult age 55 to 64 is widowed or divorced than having never been married at all.

Household type Most adults age 55 to 64 live in family households in Colorado counties. Other than Denver County, adults age 55 to 64 in family households outnumber those in nonfamily households by 2:1 or more. The highest percentage in family households is in Jefferson County at 70%. In Denver County, 48% of the specified population lives in nonfamily households, which is the highest percentage in the polled counties.

Number in household under 18 For the 55 to 64 household population with children living at home, the majority (63%) tended to have only one child under 18 staying with them. Denver County has the most individuals under 18 years of age (27%) living with

people in the 55-to-64 age range. Jefferson County has the second highest number at 25%, followed by Arapahoe at 23%.

Table 2. Number in household under 18 by county

Number in household under 18	Adams	Arapahoe	Denver	Douglas	Jefferson
1 person under 18 years	1,126	1,653	1,662	440	1,868
2 or more people under 18 years	816	847	1,272	243	842
Total	1,942	2,500	2,934	683	2,710

Source: U.S. Census Bureau, Census 2000 Sample Data File

Own or rent dwelling More adults age 55 to 64 own dwellings rather than rent them in the region. Douglas County has the highest percentage of this age group that owns dwellings at about 93%. Of the polled counties besides Denver, more than 80% of the specified population owns dwellings. Denver County has a slightly lower percentage of home ownership at 68%.

Household income (1999) Adams County has the largest percentage of adults age 55 to 64 (14%) with a household income less than \$20,000. Adams also has the smallest percentage (12%) with a household income more than \$100,000. Douglas County has the largest population of adults age 55 to 64 with a household income more than \$100,000.

Table 3. Household income by county

Household income	Adams	Arapahoe	Boulder	Denver	Douglas	Jefferson
Less than \$10,000	988	951	617	3,061	186	1,174
\$10,000 to \$19,999	1,104	1,362	614	2,762	235	1,373
\$20,000 to \$29,999	1,715	1,902	1,074	2,943	235	2,346
\$30,000 to \$39,999	1,828	2,279	1,204	2,988	517	2,949
\$40,000 to \$49,999	1,773	2,142	1,003	2,545	392	2,761
\$50,000 to \$59,999	1,658	2,251	1,155	2,326	557	2,575
\$60,000 to \$74,999	2,046	2,673	1,252	2,352	804	3,631
\$75,000 to \$99,999	1,849	3,527	1,957	2,581	984	4,565
\$100,000 to \$124,999	835	2,172	1,327	1,428	994	2,744
\$125,000 to \$149,999	357	1,254	734	770	675	1,346
\$150,000 to \$199,999	336	1,094	692	671	585	1,277
\$200,000 or more	273	1,192	836	929	628	1,219
Total	14,762	22,799	12,465	25,356	6,792	27,960

Source: U.S. Census Bureau, Census 2000 Summary File 4 (SF 4)—Sample Data

Education level (Note: information provided is for the 45-to-64 age group) The Denver area is known as one of the highest educated metropolitan areas in the country with 69% having some college degree. Douglas County has the largest percentage of adults age 45 to 64 (58%) with some sort of college degree (associate's, bachelor's, graduate or professional). Adams County has the least amount (25%) of 45- to 64-year-olds with some sort of college degree.

Table 4. Education level by county

Education level	Adams	Arapahoe	Denver	Douglas	Jefferson
Less than 9th grade	4,047	2,279	9,138	145	1,800
9th to 12th grade, no diploma	8,215	4,836	11,239	834	5,667
High school graduate (includes GRE)	22,144	20,339	21,183	5,325	27,913
Some college, no degree	18,020	29,323	22,907	9,698	35,704
Associate's degree	4,644	8,048	5,550	3,170	9,105
Bachelor's degree	8,360	28,749	22,190	11,773	30,691
Graduate or professional degree	4,488	18,566	17,589	7,046	20,697
Total 45 to 64 years:	69,918	112,140	109,796	37,991	131,577

Source: U.S. Census Bureau, Census 2000 Summary File 4 (SF 4)—Sample Data

Employment status Nearly two-thirds of 55- to 64-year-olds (63%) are employed in some industry or the armed forces. Denver County has the highest percentage of individuals that are unemployed, not in the labor force or who have not been in the labor force for at least 16 years (28%), and Douglas County has the least (6%).

Table 5. Employment status by county

Employment status	Adams	Arapahoe	Denver	Douglas	Jefferson
Employed or Armed Forces	15,196	25,034	23,199	7,932	30,399
Unemployed	397	692	759	87	643
Not in labor force or not in labor force for at least 16 years	9,955	11,765	15,461	3,646	15,521
Total	25,548	37,491	39,419	11,665	46,563

Source: U.S. Census Bureau, Census 2000 Sample Data File

Occupation or industrial sector Jefferson County has the greatest number (29%) of 55- to 64-year-olds working in any occupation or industrial sector. Douglas has the least at 7%. The top areas in which 55- to 64-year-olds are employed are: office and administrative support (16%); sales and related occupations (11%); and management occupations (9%).

Table 6. Occupation/industrial sector by county

Occupation/industrial sector	Adams	Arapahoe	Denver	Douglas	Jefferson
Management occupations	1,749	3,879	2,810	1,917	4,454
Business and financial operations occupations	834	2,199	1,812	763	2,614
Computer and mathematical occupations	299	871	484	328	896
Architecture and engineering occupations	353	1,088	562	564	1,415
Life, physical and social science occupations	68	356	351	102	653
Community and social services	180	482	692	145	644
Legal occupations	137	447	716	81	407
Education, training and library occupation	873	2,236	1,957	412	2,833
Arts, design, entertainment, sports and media occupations	255	580	739	254	661
Healthcare practitioners and technical occupations	524	1,429	1,421	449	1,554
Healthcare support occupations	208	294	497	19	462
Service occupations: protective service occupations	488	549	481	100	719
Food preparation and serving-related occupations	726	552	995	114	653
Building and grounds cleaning and maintenance occupations	844	733	1,470	173	665
Personal care and service occupations	698	810	956	197	951
Sales and related occupations	2,235	4,489	3,488	1,702	5,217
Office and administrative support occupations	4,077	6,212	5,400	1,542	7,668
Farming, fishing and forestry occupations	90	13	111	0	28
Construction and extraction occupations	1,187	977	1,206	245	1,793
Installation, maintenance and repair workers	1,068	996	839	282	1,148
Production occupations	1,646	1,314	2,075	215	2,190
Transportation and material moving occupations	1,927	1,407	1,784	360	1,775
Total	25,548	37,491	39,419	11,665	46,563

Source: U.S. Census Bureau, Census 2000 Sample Data File

Health Insurance status The Colorado Health Institute (CHI) conducted an analysis to identify the percent of adults age 55-64 who are without health insurance living in the 6-county Denver area and statewide. The data sources used include:

1. The U.S. Census Bureau's Current Population Survey (CPS), March Supplement. This is a national sample survey of approximately 4,000 Colorado households conducted every March.
2. The Colorado Household Survey (CHS). This one-time survey of health coverage was administered to approximately 10,000 Colorado households in the summer of 2001.
3. Demographic data from the Colorado Office of the Demographer.

Table 7. Number of 55 to 65 uninsured adults in Denver metropolitan 6-county area and Colorado

	Percent uninsured	Number uninsured
Denver 6-county (2001)	7%	13,000
Denver 6-county (2006)	7%	18,000
Colorado (2003-05)	13%	57,000

Source: Denver metro uninsured rate and number based on CHI's analysis of 2001 Colorado Household Survey. The 2006 number is based on the 2001 uninsured rate applied to 2006 estimates of the total population age 55-64 in 6-county Denver metro area from the Colorado Office of the Demographer. Colorado uninsured estimates based on CHI's analysis of U.S. Census Bureau's Current Population Survey.

V. RESEARCH FINDINGS

“The ’60s shaped who I am today. ... Here we have engaged people who know how to really get things moving. How are we going to get engaged for change again?”

Focus group participant

The road map for Denver-area boomers is clear: it includes staying in the workforce, getting involved in civic engagement and learning new things.

Future Plans of Denver-area Boomers

Survey respondents were asked to rate specific statements (e.g., change to part-time or flexible work) in terms of what they have already done, are currently doing or would like to do. As the graph on the next page shows, boomers’ current and future plans include a wide array of interests.⁶ Denver metro boomers primarily want to travel (70%), take classes for fun (70%), and travel for work, service or learning (69%). Over half want to change to part-time or flexible work. However, the degree of interest in these areas is often influenced by income status, gender and/or race/ethnicity, as described below.

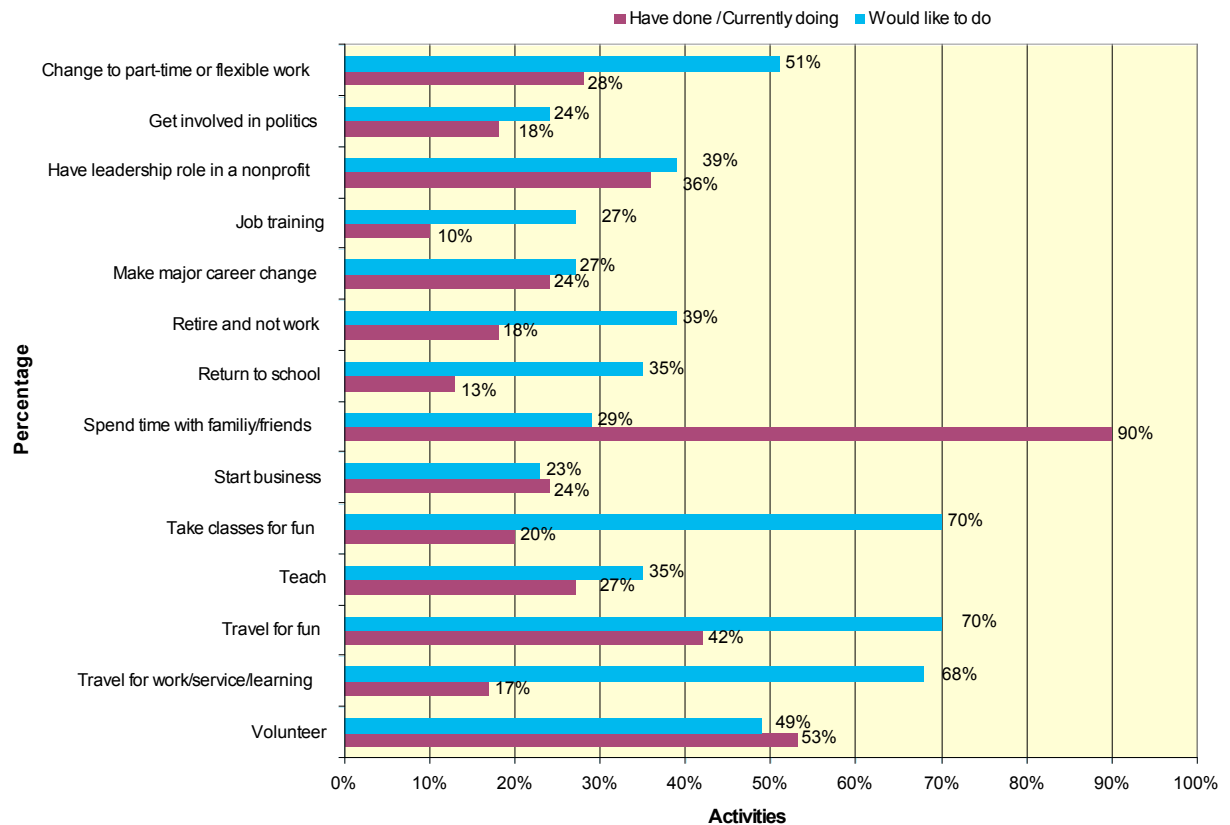
*“I would love to travel, and have the freedom to go when I want.
I’d like to volunteer in ways that are different than the work I’m doing.
I’d like to take classes for fun or learning.”*

Denver area boomer

The 9NEWS survey showed similar results of broad interests across gender and race/ethnicity when asked about future work and learning. When asked, *“What would motivate you to get additional education or job training?”* each racial/ethnic group cited “enjoy learning” and an “opportunity to socialize” as key reasons for pursuing these activities, with 65% of white respondents, 61% black/African American and 66% Hispanic/Latino responding similarly to that question.

⁶ Percentages have been rounded to the nearest whole number throughout the report for ease of reading.

Figure 3. Boomer desires: future plans



There is a **diversity of issues that captures boomer interest**. Despite some critics' view of boomers as self-centered and narcissistic, the majority of survey respondents' answers to open-ended questions about future plans ("What is it that you would like to do during the next phase of your life?") and the overwhelming majority of participants in each focus group stated unequivocally their desire to contribute to the greater good either through meaningful work or volunteering.

Of the 20 issues that survey respondents were asked to rank regarding future service, each issue garnered at least 16% interest (Figure 4). With close to 300,000 55- to 65-year-olds living in the six- county region in the next 10 years, this is good news for employers, nonprofits and educational institutions, which will have a cadre of committed individuals eager to get involved.

What Does Retirement Mean to Mile High Boomers?

"I went through the civil rights movement, anti-war movement, and the make love, not war. ... My first marriage was half-naked in the fields under the sun. I think the way we'll do retirement is getting involved again in social issues and awareness.

I don't think we'll be sitting at home."

Union representative focus group

Focus group participants, interviewees and respondents to open-ended survey questions about "What's next?" define retirement in almost as many ways as there are individuals. Responses ranged from *"I don't want to"* and *"I can't"* to viewing retirement as a critical junction for new horizons. This next stage in life is often viewed as an opportunity for both exploration and for giving back. As one focus group member stated: *"We've made the money, we've put our kids through school, now we want something different, more meaningful."*

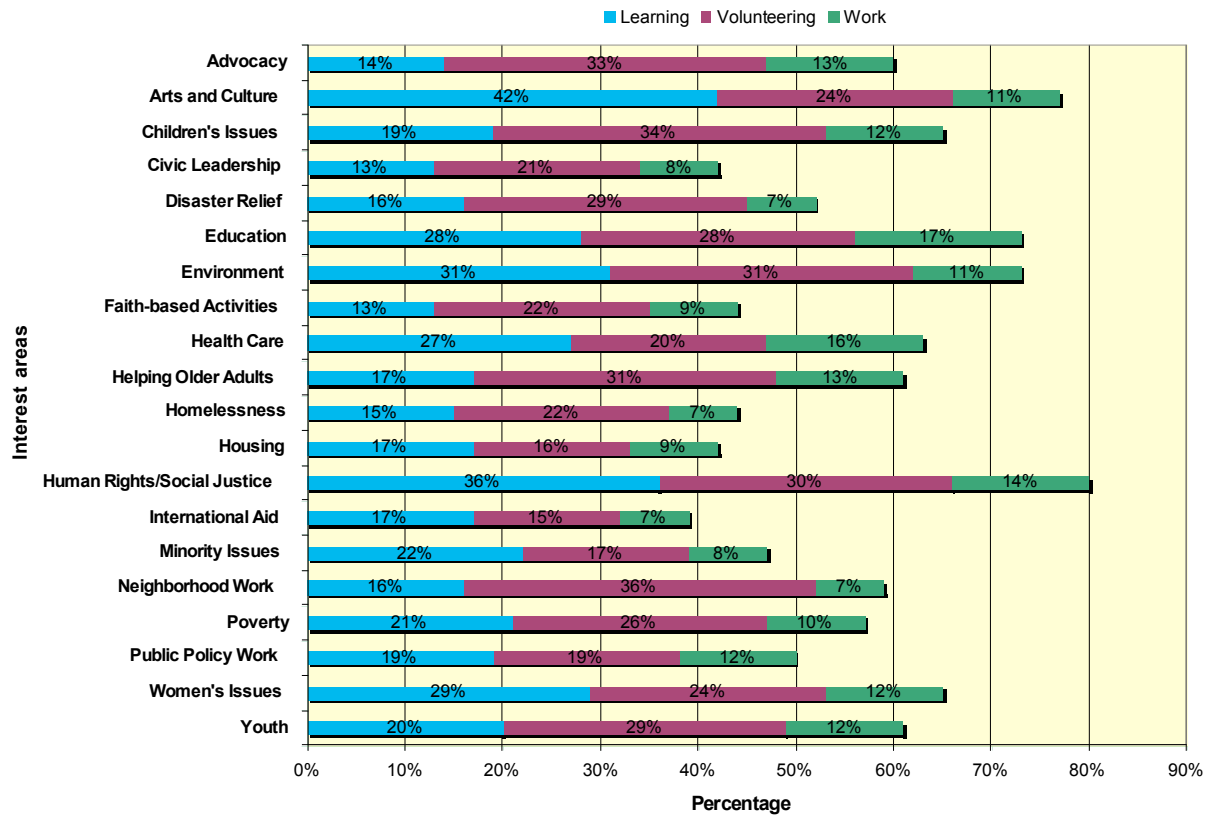
Flexibility, balance and engagement in work and volunteering, are common themes expressed by many in focus groups, and by interviewees. One individual defined retirement: *"Always working but less intensively and differently, more leisure and travel and greater involvement in community, particularly in a hands-on, grassroots manner."* Or another: *"Having spent three decades in the fast lane, I am experimenting with how to apply my talents in a way that is constructive and satisfying while living with a slower pace and greater "balance." Balance means involvement in work, community, and personal growth and fun."*

Working Many boomers envision part-time employment, seeking to continue or even gain a new work experience. *"A lot of boomers can't retire, but they want to work differently."* The need for health benefits and cost-of-living expenses prevent many from stopping work altogether. One nurse said: *"Retirement means no healthcare."*

All for the greater good Be it through work, service or learning, boomers overwhelmingly want to *"continue to make a difference in life."* *"The realities of "retirement" will require that I work at least two days a week to supplement my retirement income. The extra time, I hope to be able to devote to community service."*

The figure below shows the survey response to the question: As you contemplate the next phase of your life, please check any of the following issues in which you have a high level of interesting in becoming personally involved either through work, volunteering or education/learning.

Figure 4. Boomer interests in learning, volunteering and work



Survey respondents indicated they are most interested in **volunteering** in:

- Neighborhood Work (36%)
- Children's Issues (34%)
- Advocacy (33%)
- Environment (31%)
- Helping Older Adults (31%)
- Human Rights/Social Justice (30%)

Denver-area boomers are most interested in **working** in the areas of:

- Education (17%)
- Healthcare (16%)
- Human Rights/Social Justice (14%)
- Advocacy (13%)

- Helping Older Adults (13%)

Survey findings shows that most 55- to 65-year-olds are interesting in **learning** about:

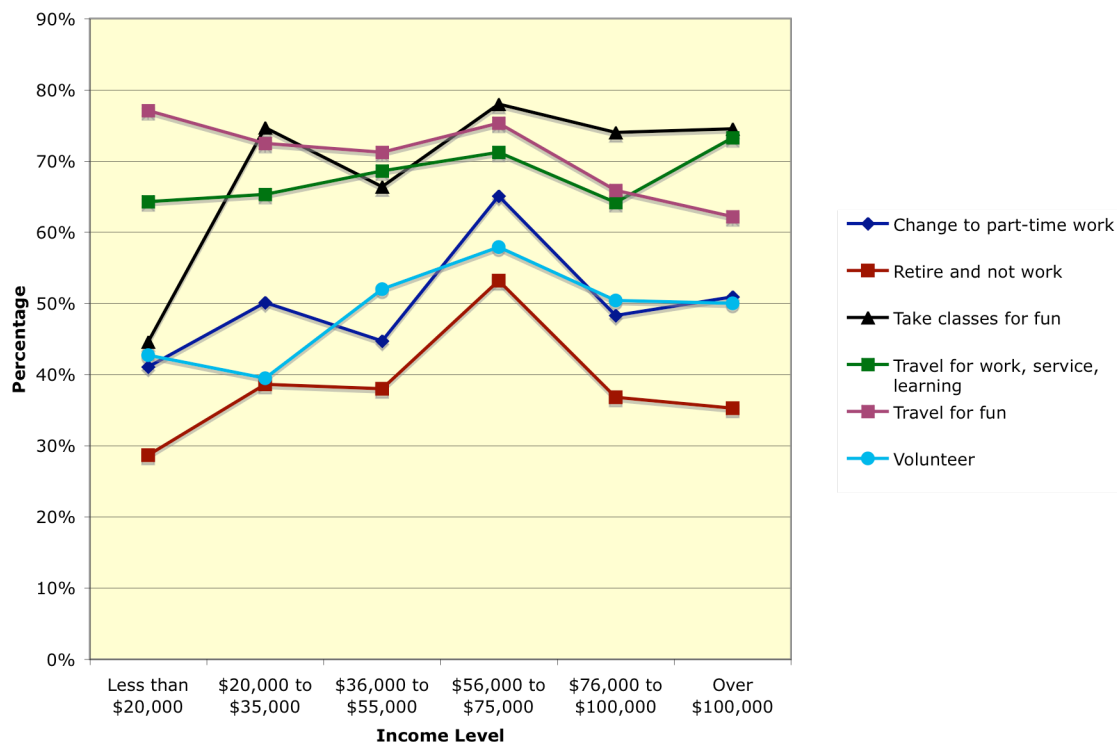
- Arts and Culture (42%)
- Human Rights/Social Justice (36%)
- Environment (31%)

A number of people also wrote in animals/animal welfare as a key area of interest.

The telephone survey results yielded similar results with Children (23%), Older Adults (15%), Healthcare (10%) and Environment (10%) scoring highest among areas that individuals would be most interested in volunteering or working.

Differences in future plans by income Comparison by income level shows that as income level increases, so do plans to get involved in politics and seek job training. Respondents with incomes below \$20,000 are less likely than others (45%) to want to take classes for fun. A higher percentage of respondents with income levels above \$35,000 plan to volunteer compared with those with lower income levels (Figure 5).

Figure 5. Future plans by income level



Difference in future plans by gender The survey asked respondents to rate statements based on whether an activity is something one has already done, would like to do, would not like to do or is already doing. Results are similar for men and women, except that men are more interested in a career change than women (31% of men and 26% women) and additional job training (36% of men and 23% of women). Women are more interested in taking classes for fun than men (73% and 63%, respectively), while men are more interested in teaching (44% and 31%, respectively).

Gender Differences: Role Models, Risk Takers, Caregivers and Breadwinners

Boomer women talk about “*defining ourselves in a different way*,” of being “*risk takers*,” making it easier to change course in “retirement” compared with their male counterparts. As one former female corporate executive explained: “*I’m not my job. I’m also a mom, I’m active in my kids’ sports, I take care of my aging parents.*”

When exploring future plans, male focus group members talked more about financial security, weighing the responsibility for supporting a family, and what that means for their family, including their adult children and even grandchildren. As one male boomer explained: “*I’ve built up a nest egg and if I followed the passion, what would that mean for my children and grandchildren?*”

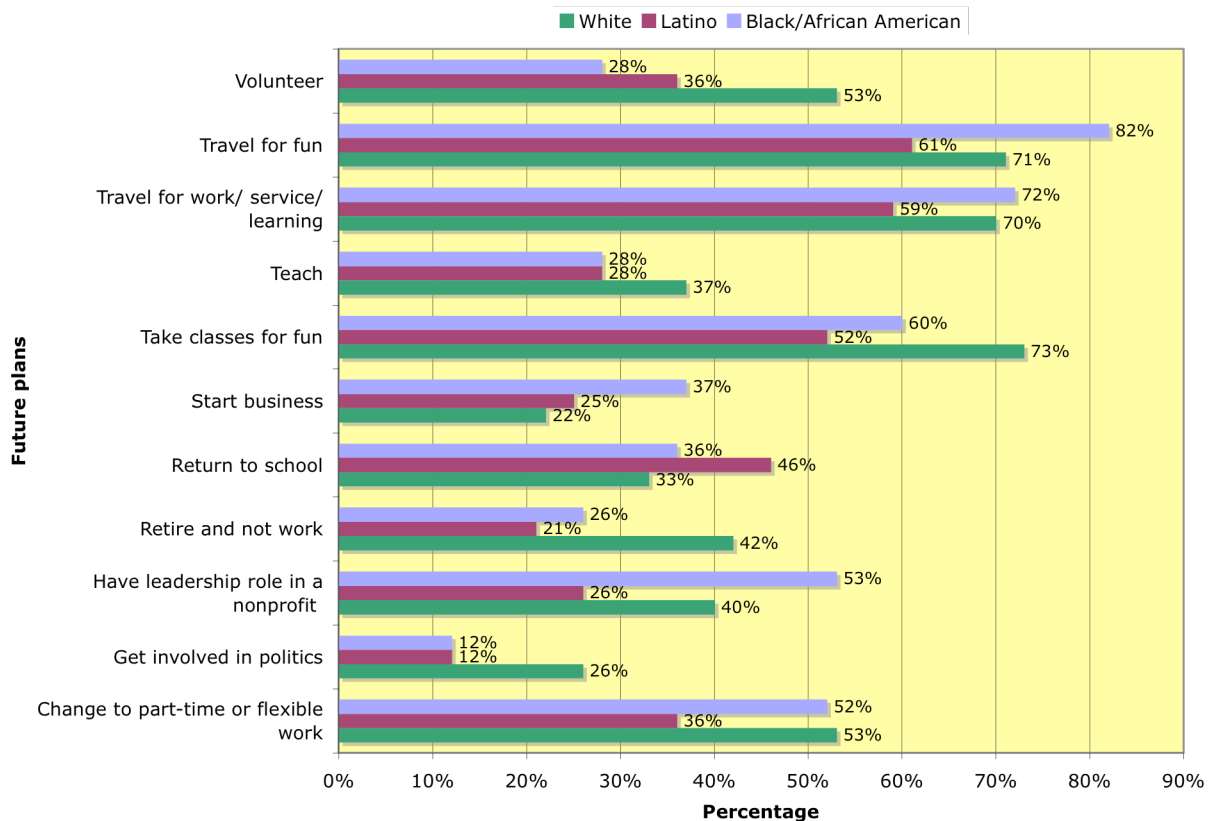
Men also acknowledged the difficulty in taking a salary cut to follow one’s passion. As one participant from the professional men’s focus group stated: “*I think my wife will have an easier time transitioning; she has a better support network. (Women’s) careers are not so hardwired. I think they’re more open to taking the next steps. ... It may be hard for our egos to do the same thing and not get paid for it.*”

While the majority of women embraced the concept of a resource center to help match their talents with interests, men were more cautious. It would have to have “*some cache to it*,” several noted. Men, in particular, talked about using their own networks first. “*I don’t think it’s natural for us to go there (to a resource center) first. The marketing and advertising would be central.*”

No matter what gender one is, few plan to fade quietly into the background after they turn 65. However, understanding these gender differences is important as institutions, employers and agencies develop successful future initiatives to engage the age group.

Differences in future plans by race/ethnicity When asked about their future plans, black/African American survey respondents were most interested in travel for fun (82%), traveling for work/service learning (72%) and taking classes for fun (60%). While Hispanic/Latino respondents showed generally less interest overall in these issues, their top areas of interest included traveling for work/service/learning (59%), taking classes for fun (52%) and returning to school (46%). Finally, white respondents were most interested in taking classes for fun (73%), traveling for fun (71%) and traveling for work/service/learning (70%). There were no differences between respondents who are primary income earners and those who are not.

Figure 6. Future plans by race/ethnicity



Note: The number of American Indian/Alaska Native, Asian, Native Hawaiian and Pacific Islander respondents were too low to include in ethnicity comparative analyses.

“We’re still fighting for things that come automatically for the dominant society.”

Latino focus group member

“Empowerment,” “civil rights” and “equality” dominated conversations among Latino, African American and GLBT focus group members. Many Latinos shared that they didn’t identify with the term “boomer.” *“When you look at the boomer generation, it’s the people who had the opportunity for the best jobs and education and that’s not us,”* explained one 60-year-old Latina. Another Latina described her peer group as *“sandwiched between children and grandparent”*; any future plans must include caring for extended family. Latino focus group participants also stated that, for most of us, future plans will always involve working because, for the most part, Latinos receive a lower salary than others racial and ethnic groups; they have little or no health insurance or retirement benefits and *“will still be in the labor force after age 65.”*

Latino focus groups also discussed the importance of maintaining the institutions created as part of the Chicano rights movements. *“We’ve come full circle. ... We fought to get access to education and healthcare. We have to go for another march. For me, it’s education, healthcare, immigrant rights, human rights. We’re part of moving it to another level.”*

African American focus group members discussed future plans through the lens of the civil rights movement. *“What I experienced in the ’60s was the revolution and a lot of changes being made. ... There are many things that are unacceptable and we feel the need to again make some changes. It’s another chapter in the beginning of where we started.”* When asked to respond to the statement: “In the 60s they changed the world, in their 60s they may do it again,” one African American focus group participant said: *“It’s not a question of “may” do it; we HAVE to do it!”*

African American focus group members also discussed the importance of keeping family together, helping their communities and the imperative of serving as role models for younger generations. *“We cannot stop until we feel we have passed on to our youth the importance of protecting civil rights and participating in positions of leadership,”* explained one African American participant. Another stated: *“I think our challenge and our responsibility is self-empowerment. ... We have to send the message to the next generations that they have to empower themselves. ... We have to empower our community. We’re not getting on the bus; we want to own the bus.”*

Responses about wanting to change careers were very similar across race/ethnicity in the telephone survey, with less than 10% of respondents indicating they were very interested in changing career paths; whereas approximately 30% reported that they were “not very” interested in changing career paths. However, more Latinos were interested in flexible or part-time work (20%) compared with black (8%) and white (10%) respondents. Between 30% and 36% of all groups indicated interest in going to school or taking a class to get additional job training.

Future plans by income earner and caregiver status Over two-thirds of survey respondents reported that they are the primary income earner for their household (77% of men and 64% of women). Only 10% of the respondents are currently responsible for caring for a child under 18, while 18% are caring for an aging family member or friend.

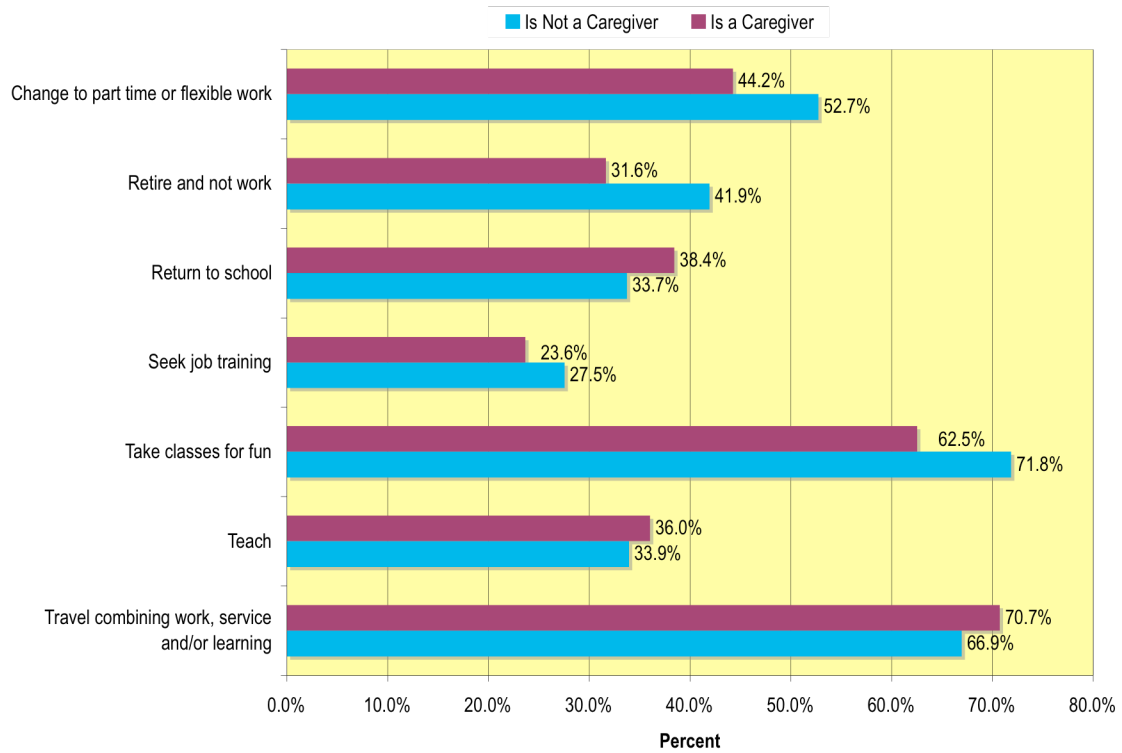
When comparing future plans between caregivers and non-caregivers, slightly more caregivers would like to teach (36% vs. 34%) and return to school (38% vs. 34%) over non-caregivers. Caregivers also tended to want to travel in a way that combines work, service or learning over that of non-caregivers (71% vs. 67%).

“ I am caring for an elderly mother ... so my horizon is defined by that.”

Small business owner and boomer daughter

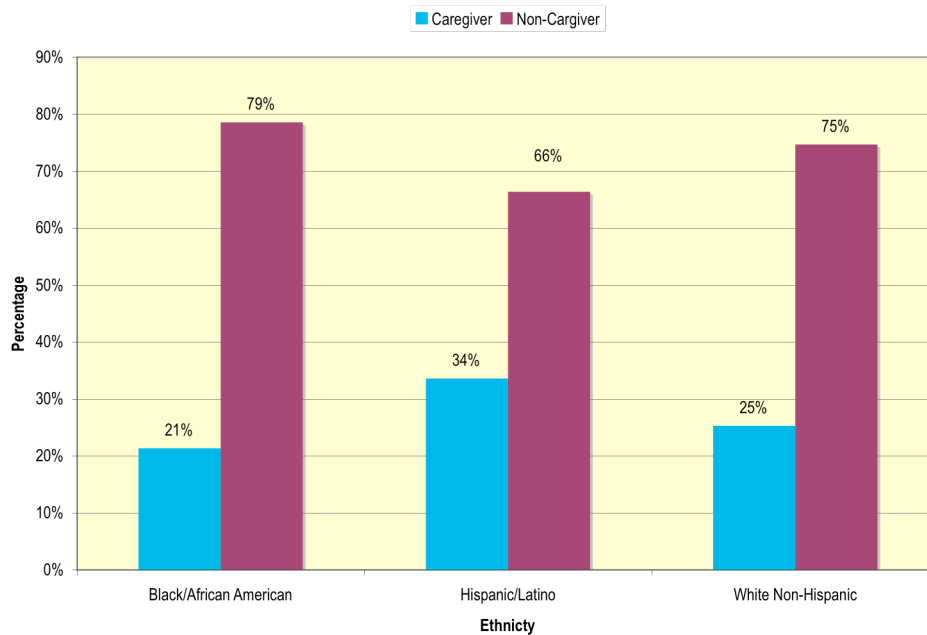
The differences between caregivers and non-caregivers are *most* evident in their views regarding future employment. More non-caregivers (42%) than caregivers (32%) would like to retire and not work. In addition to wanting to retire, more non-caregivers (28%) than caregivers (24%) would also like to seek additional job training. Moreover, more non-caregivers (53%) than caregivers (44%) would like to change to part-time or flexible work schedules. Non-caregivers were also more likely to want to take classes for fun than caregivers (72% to 63%) (Figure 7).

Figure 7. Future plans by caregiver status



Who are the caregivers? The majority of caregivers in the survey are women (66%) vs. men (30%). The figure below shows the percentage of survey respondents by race/ethnicity who are caring for a child under 18, or a family member or friend.

Figure 8. Caregiver by ethnicity



The data reveal a broad range of income among Denver area caregivers as shown in the table below.

Table 8. Caregiver status by income

2006 Income	Caregiver Status	
	No	Yes
Less than \$20,000	13%	11%
\$20,000–\$35,000	14%	16%
\$35,000–\$55,000	21%	15%
\$55,000–\$75,000	18%	15%
\$75,000–\$100,000	13%	17%
Over \$100,000	20%	25%

Despite common perceptions that boomers are taxed as the “sandwich” generation, caring for both children and aging parents, partners or family members, the survey results indicate that, in fact, Denver area boomer caregivers plan to remain very involved.

Table 9. Future plans of caregivers by income level

Income in 2006	Less than \$20,000	\$20,000–\$35,000	\$35,000–\$55,000	\$55,000–\$75,000	\$75,000–\$100,000	Over \$100,000
Volunteer my time	53%	59%	69%	80%	78%	85%
Work for a nonprofit	33%	26%	30%	28%	29%	34%
Engage in advocacy activities	30%	19%	28%	29%	40%	44%
Make financial gifts to issues, causes or organizations I care about	22%	28%	41%	53%	62%	80%
I don't plan to contribute	13%	7%	9%	3%	5%	4%

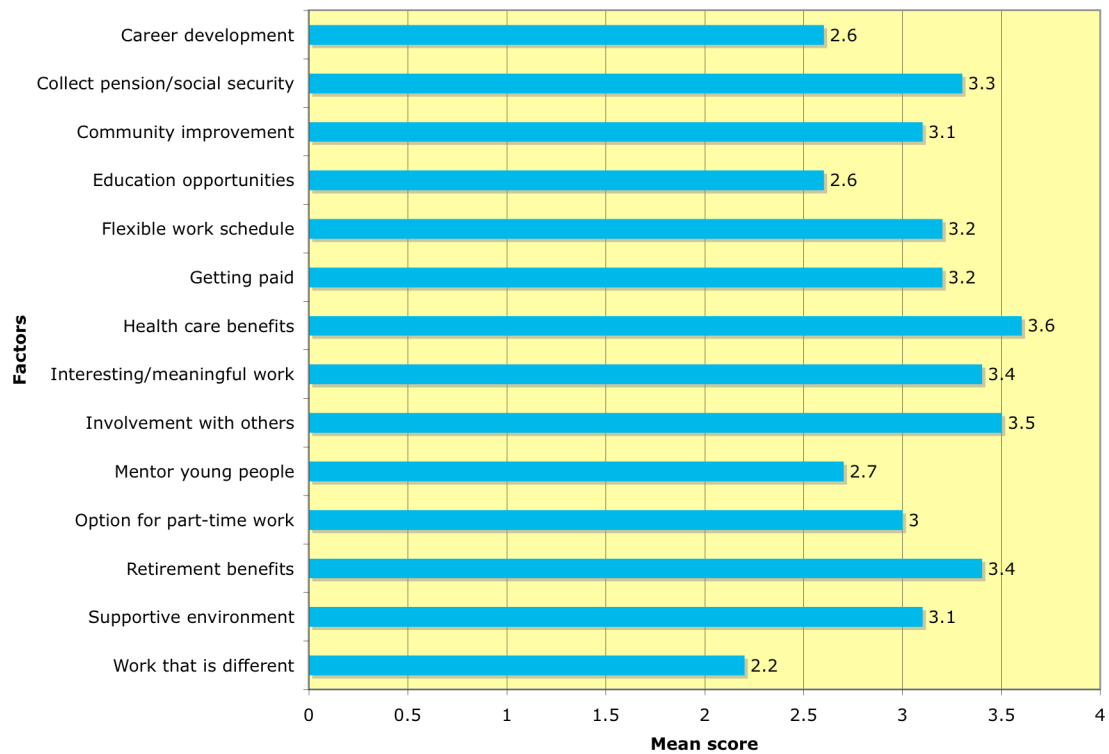
What Key Factors Influence Future Plans?

“What I would like to do is travel in a small motor home...what I WILL be doing is working until the day I die because housing markets are skewed, it is impossible to invest and save enough to make my dream happen.”

Boomer survey respondent

Various factors influence boomers' decisions on future plans. The figure below (Figure 9) provides information on those factors using mean scores where 1 = not at all important, 2 = somewhat important, 3 = important and 4 = very important. Healthcare benefits (3.6) ranked as the most important factor, followed by involvement with others (3.5) and by retirement benefits and interesting/meaningful work (3.4). There were no differences by gender, ethnicity, caregiver or income earner status.

Figure 9. Factors that influence decisions about what to do next



However, comparisons by income level indicate that percentage of respondents who want flexible schedules and part-time work increases with income level, and that the importance of getting paid increases as income level decreases. Table 10 describes mean scores on a 4-point scale, where 1 is not at all important and 4 is very important.

Table 10. Factors that influence future plans by income level

	Less than \$20,000	\$20,000 to \$35,000	\$36,000 to \$55,000	\$56,000 to \$75,000	\$76,000 to \$100,000	Over \$100,000
Flexible work schedule	2.94	2.97	3.22	3.38	3.31	3.36
Getting paid	3.40	3.41	3.34	3.29	3.08	2.58
Healthcare benefits	3.57	3.93	3.67	3.72	3.51	3.28
Option to work part time	2.71	2.93	2.96	3.14	3.12	3.02

"Healthcare, healthcare, healthcare" noted one interviewee when asked to identify the single most important issue facing boomers today. Focus group participants talked about the need to continue to work out of financial necessity as well as to retain benefits for as long as possible. Health benefits also ranked as the second most important factor (14%) after salary (19%) for deciding whether or not to change career paths in the 9NEWS survey. The issue of healthcare also was the single most common topic of discussion in each focus group. The implications for future initiatives on healthcare are discussed later in this report.

"I think all of us would say that if we had unlimited money, we would make different choices. I think healthcare is a serious concern influencing how we make those decisions."

Men's focus group

How Do Boomers Plan to Contribute in the Future?

"People need to contribute at the level they want. ... Social problems are enormous and we need talent and resources. I want to be on a board, but I don't just want to be used for my financial connections. I want more intellectual contributions."

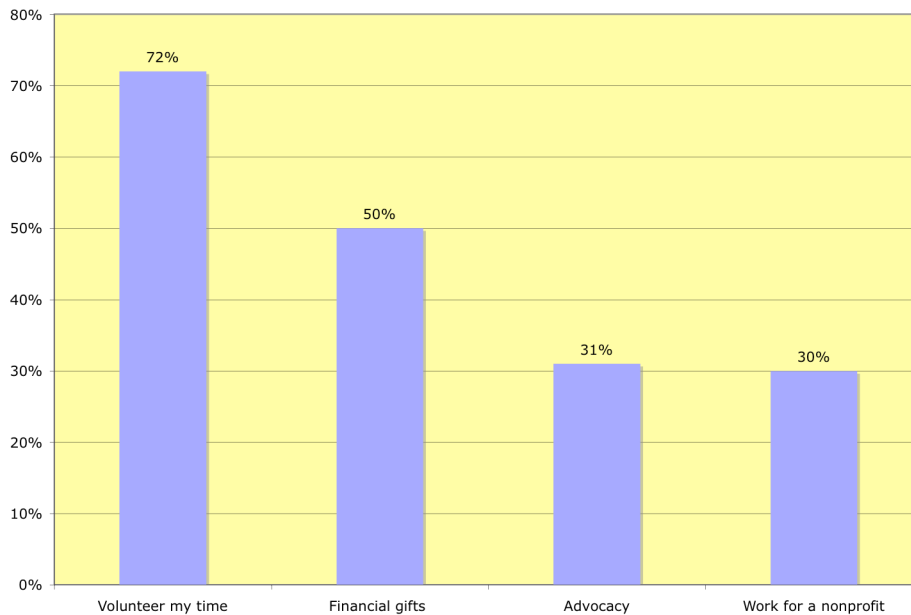
Women's focus group

"I plan to continue volunteering until I drop. I can't imagine not being involved in something."

Survey respondent

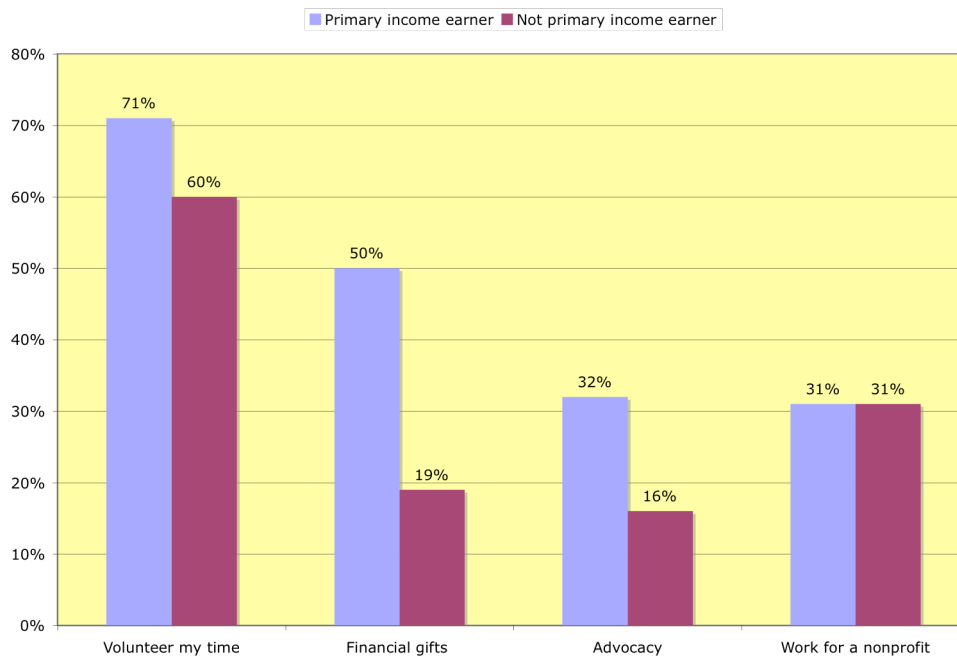
Survey respondents indicated they would like to contribute to issues they care about in multiple ways (Figure 10). When asked to check off, "How do you plan to contribute to issues or causes you care about?" almost three quarters reported that they would like to "volunteer their time," while half plan to "make financial gifts to issues, causes or organizations they care about." About a third plan to "engage in advocacy activities" (31%) or "work for a nonprofit" (30%). Only 6% indicated that they do not plan to contribute at all. Women were more likely than men to contribute in each area.

Figure 10. Plans to contribute



Interestingly, as shown in Figure 11 below, respondents who were the primary income earners were more likely to plan to volunteer their time (71% compared with 60%), make financial contributions (50% compared with 19%) and engage in advocacy compared with those who were not the primary income earners (32% compared with 16%).

Figure 11. Plans to contribute by income earner status

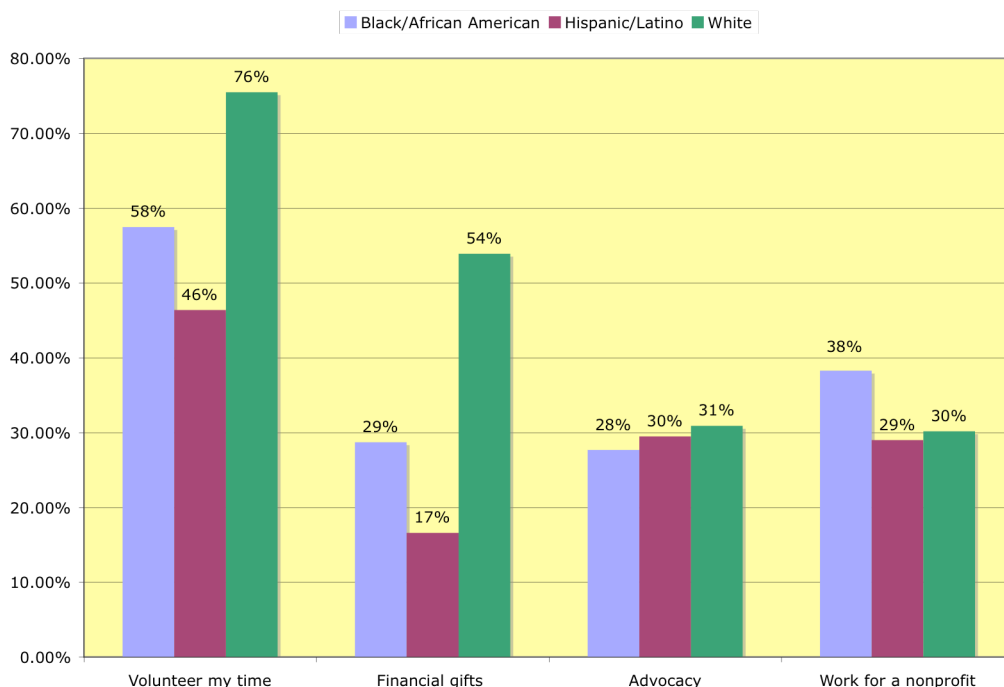


There were also racial/ethnic differences (Figure 12). A higher percentage of white respondents reported plans to volunteer their time and make financial gifts than Latino and black/African American respondents.

“I think of ‘making financial gifts’ as something formal, like giving \$5,000 to your college fund. I can’t do that ... but I do give money to my church every Sunday.”

African American survey respondent

Figure 12. Plans to contribute by race/ethnicity



Note: The number of American Indian/Alaska Native, Asian, Native Hawaiian and Pacific Islander respondents was too low to include in ethnicity comparative analyses.

“I marked on the survey that ‘I don’t plan to make financial contributions.’

That doesn’t mean that I don’t want to. ... I just can’t.”

Latino survey respondent

The term “volunteering” may also have different connotations among different racial/ethnic groups. Latino focus group members explained that work with family and neighborhood was not considered as traditional “volunteer” work, which may explain why the percentages for volunteering are lower for Latinos. As one Latino filling out the Spanish paper/pencil survey said, *“I don’t really understand this question about volunteering. I just help out my neighborhood whenever I’m needed. I don’t consider that volunteering.”*

As discussed in more detail in the next section, a large percentage of all racial/ethnic groups are involved in some sort of volunteer activity according to the survey; comparisons between race/ethnic groups show that 65% of black/African American respondents volunteer, compared with 49% Hispanic/Latinos and 57% white respondents.

What are Boomers Thinking in Terms of Work, Service and Learning?

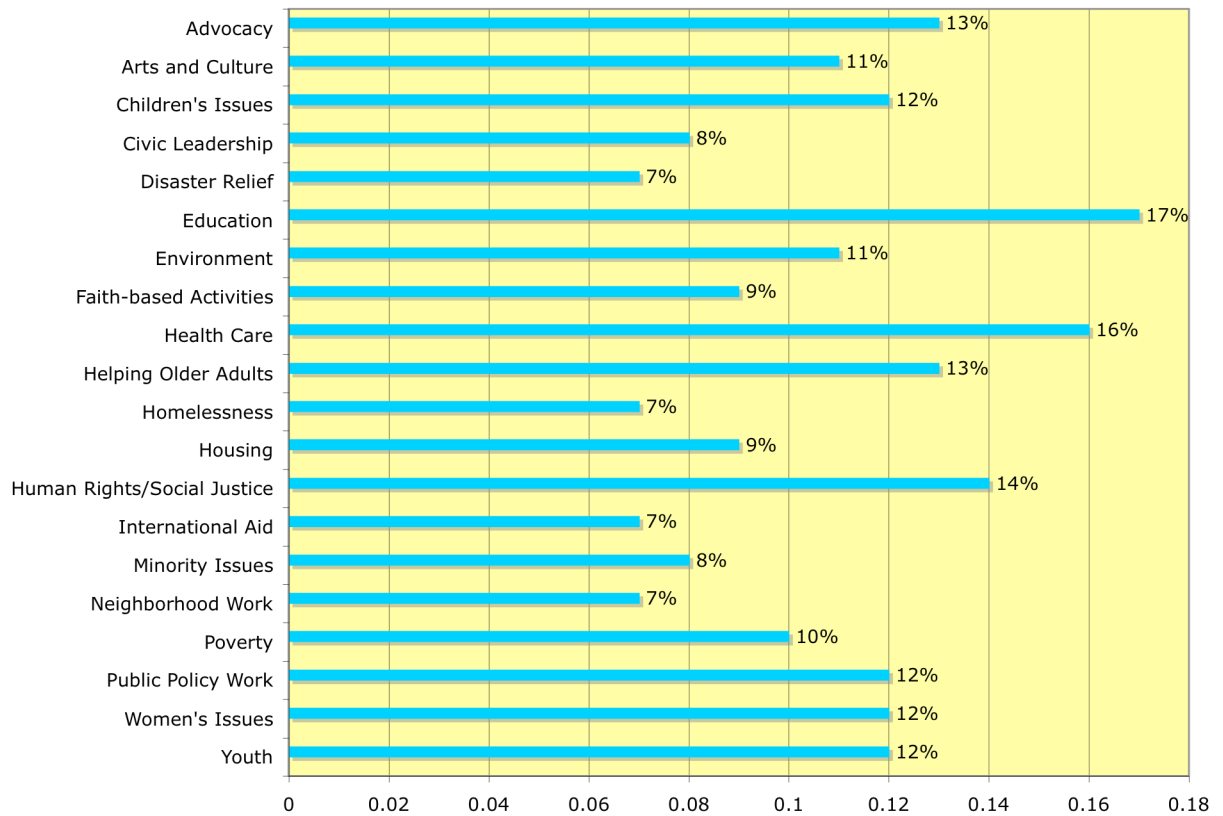
Work

Denver area boomers view “next steps” as a departure from their parents’ generation’s plans—typically characterized by celebrating retirement as the end of a long-held job or career. Work continues to be the norm for many 55- to 65-year-olds, be it out of necessity or desire to bridge the gap between mid-life career and new opportunities to utilize well-developed skills toward new work options.

Variety is the spice of life...

Metro Denver boomers have a wide range of interests when thinking about future work. Survey respondents show a strong interest in working in the areas of education (17%), healthcare (16%) and human rights/social justice (14%). However, eight other categories captured at least 10% of survey respondents’ interests, demonstrating that there is no one single area on which 55- to 65-year-olds are focusing.

Figure 13. Interest areas for work



Focus group participants from the GLBT community talked about their need, as boomers, to continue working on basic civil rights. As one participant explained: *“As long as we are fighting for our rights, we do not have the energy that could be put into different efforts.”*

When asked what kinds of activities they would like to do in the future, with 10 or even 20 years left to continue or even start a new career, over half of the survey respondents aspire to change to part-time or flexible work (51%); close to 30% indicate they want to make major career change or seek job training; almost one-quarter (23%) say they would like to start a business. These results mirror the MetLife *New Face of Work* study, which concludes, “*These individuals appear to be inventing not only a new stage of life between the middle years and true old age, but a new stage of work.*”⁷ As discussed in the next section, this focus on continued work has enormous implications for employers, who must learn how to garner the experience, education and ambitions of this generation beyond serving burgers and shakes or stocking shelves at big box stores.

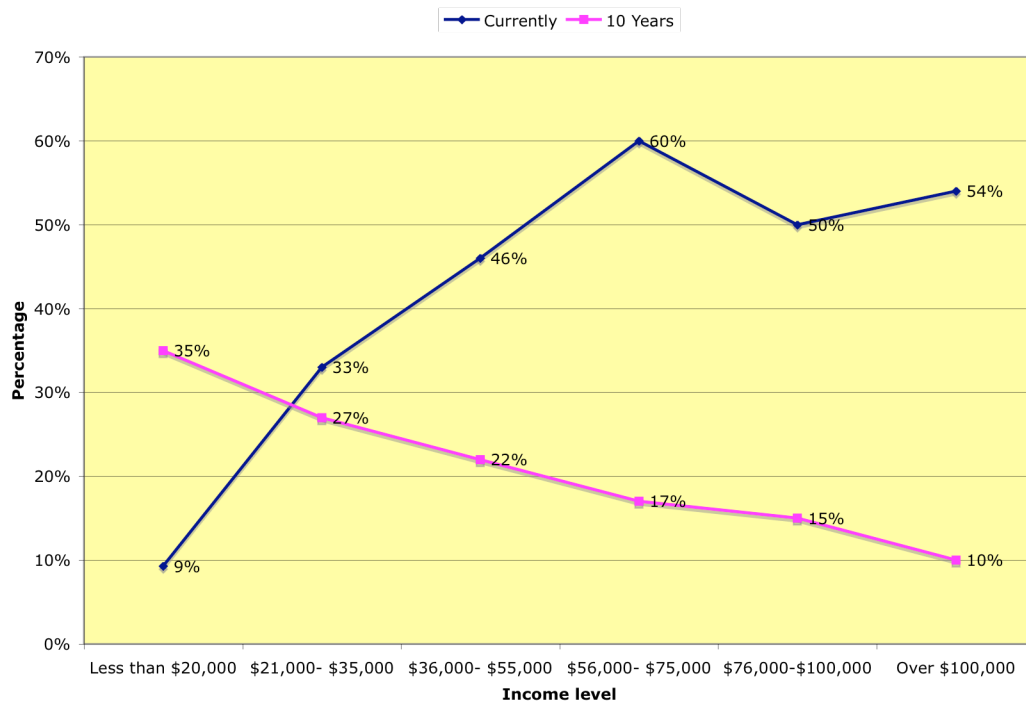
“Nurses don’t have access to very good retirement options. Unless they’ve saved well, I think you’d find many nurses saying that retirement without working is a huge challenge or even impossible.”

Nurses focus group participant

Income as a factor Not surprisingly, one’s current income is a critical factor when contemplating work options in the next decade. When asked to project their employment status 10 years from now, the number of survey respondents who expect to still be working full time drops by nearly one-fifth (20%). Comparisons between income levels show that as income level increases, so does the percentage of respondents with current full-time employment. However, as income level increases, the percentage of respondents who believe they will have full-time employment in 10 years decreases as illustrated in the figure below.

⁷ New Face of Work Survey. (2005). MetLife Foundation/Civic Ventures.

Figure 14. Current and projected employment status in 10 years by income level



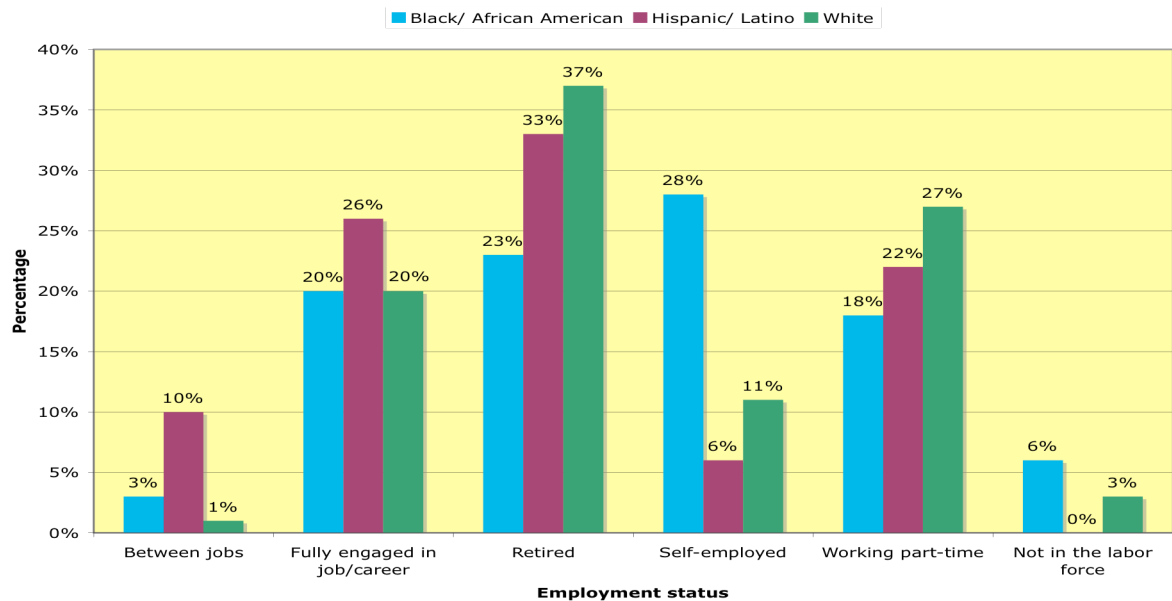
Whatever one's income, many boomers would also like to make changes in the future as shown in the table below.

Table 11. Situations people would like to change

Would like to....	Current Work Status		
	Full Time	Part Time	Self-Employed
Change to part-time work	29%	15%	76%
Make a major career change	26%	25%	21%
Start my own business	25%	20%	11%

By ethnicity Comparisons by ethnicity show that a lower percentage of black/African American boomers (23%) expect to retire in 10 years compared with Latino (33%) and white (37%) respondents.

Figure 15. Projected employment status by ethnicity



Continuing to work . . . in different ways

“Continue to work in a field I care about.” “Working part time in my field of interest: public health.” “Work for the Peace Corps.” “Always will work!” “Work with the humane society.”

The list goes on and on. Denver-area boomers resoundingly know they will continue to work in some capacity after “retirement.” In focus groups, and in the open-ended survey question, “What is it that you would like to do during the next phase of your life?” many individuals say would like to continue to work but on a more part-time basis, if financially possible. Moreover, boomers envision they will apply their current skills in a new way.

The nurses focus group members talked about utilizing their medical skills while working in another country, combining travel with work; the teacher focus group members explored how they might use their educational skills in ways other than direct classroom work, such as mentoring new teachers, children, or joining the Peace Corps to teach. As one teacher explained, *“You develop a lot of skills (as a teacher), and then you retire. ... It’s a combination of skills you’ve developed, finding a place to use them. ... I’ve been working with a group that is trying to amend TABOR. I still use a lot of the skills I developed during my teaching career.”*

“The realities of ‘retirement’ will require that I work at least two days a week to supplement my retirement income.”

Focus group participant

Redefining the workplace While much is written on the “devastating loss of human capital”⁸ with the baby boom generation moving toward retirement, Denver metro boomers expect to continue working at least part time in their retirement years, according to the survey results. When asked what they would like to do in the future, half of the survey respondents indicated they would like to change to part-time or flexible work; over a quarter said they wanted job training; 35% indicated they wanted to teach and 27% indicated they wanted to make a major career change. Boomers, in fact, could be part of the solution to the predicted workforce crisis. Continued employment could be a win-win situation for employers and employees.

“All this experience and knowledge we have and nobody gives a damn!”

Denver area boomer

Employers are also viewed by many boomer focus group participants as **underutilizing the “experienced dividend” in the workplace**. Studies project a mass exodus of older adults from the workforce in government, in healthcare professions and in teaching. In the work survey, about two-thirds of employers believe that boomers are a solution to staffing changes that may lie ahead, yet, repeatedly, focus group members pronounce the lack of opportunity or attractive solutions (flex and part time) for them to find new employment or remain in their current job. Ageism reigns fiercely. And although workforce centers and job fairs attempt to connect older adults with employment opportunities, boomers report that employers are often recruiting for lower-paying jobs. As one gentleman exiting a 50+ job fair said in exasperation, *“I can’t afford to support my family on these jobs, at \$8 to \$12 an hour. These are jobs for teenagers!”*

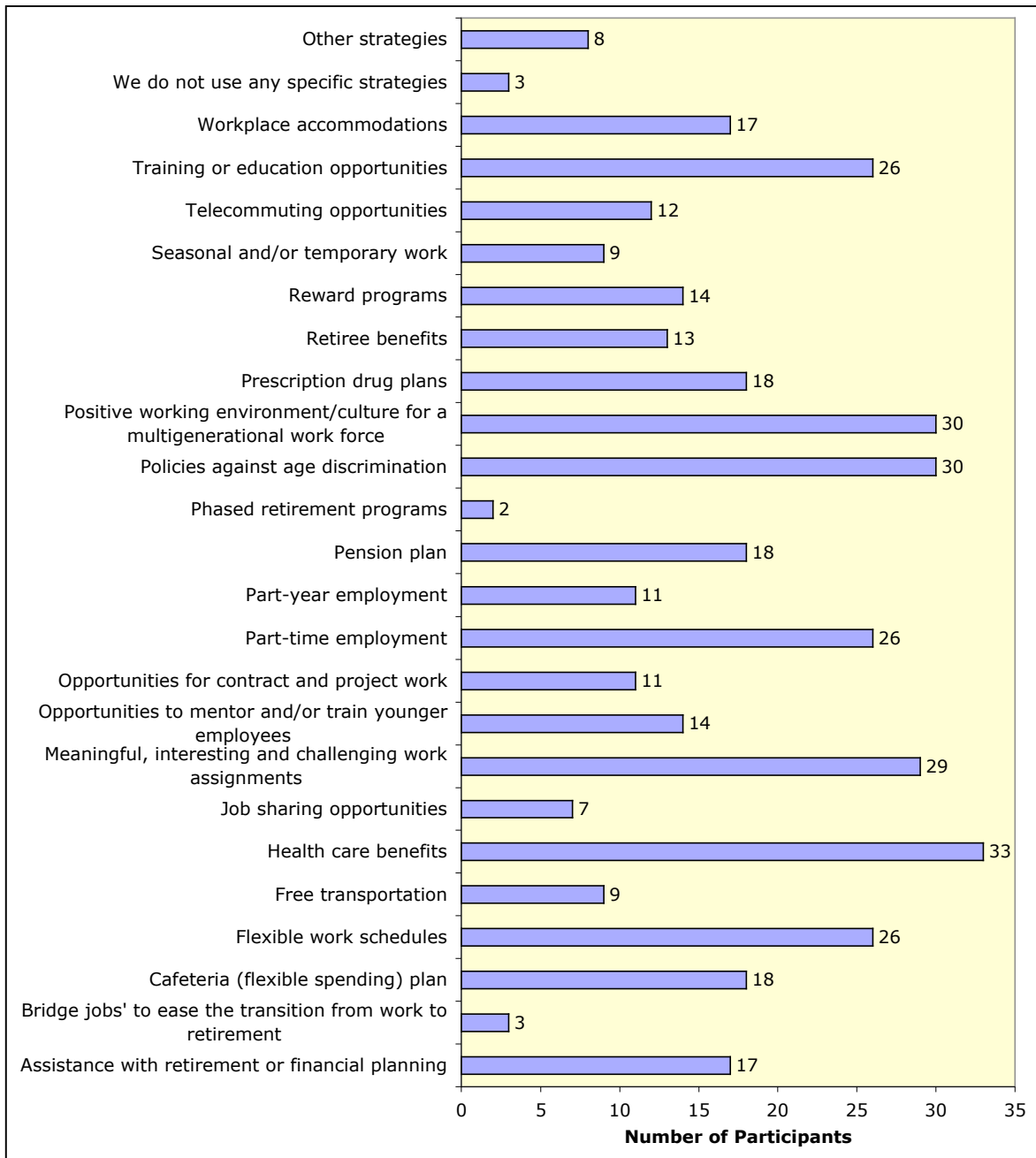
How are employers viewing boomers? Participants from 54 nonprofit organizations, businesses and government agencies across the Denver metro area responded to the Web-based survey about employment opportunities for workers age 55–65. The vast majority of respondents reported that less than 15% of their new hires were age 55–65, and the hires in this age range were primarily women.

⁸ Kleyman, P. (2006). Boomers to redefine workplace. *Aging Today*.

Perceptions of benefits and challenges Respondents felt that the greatest benefits of workers 55–65 are their commitment to quality work and ability to relate well to people. Like service and educational organizations, they reported few challenges serving adults age 55+. Among those, however, were higher costs for compensation and healthcare, and difficulty accepting supervision from younger workers. Respondents strongly agreed that workers 55–65 represent a solution to staffing challenges that may lie ahead and that they encourage employees age 55–65 to stay on the job. However, few have begun to actively explore and implement strategies that may be critical to retaining an aging workforce.

Retention strategies Employers were asked on the Web-based work survey if they used strategies to retain employees age 55 to 65. Of those who indicated they did, respondents identified the following strategies they used to retain this age group: policies against age discrimination ($n = 30$), positive working environment/culture for a multigenerational work force ($n = 30$), and having meaningful, interesting and challenging work assignments ($n = 29$). As the figure below shows, few stakeholders reported using strategies such as assistance with retirement or financial planning ($n = 3$) and phased retirement programs ($n = 2$). Several organizations reported not using any specific strategies.

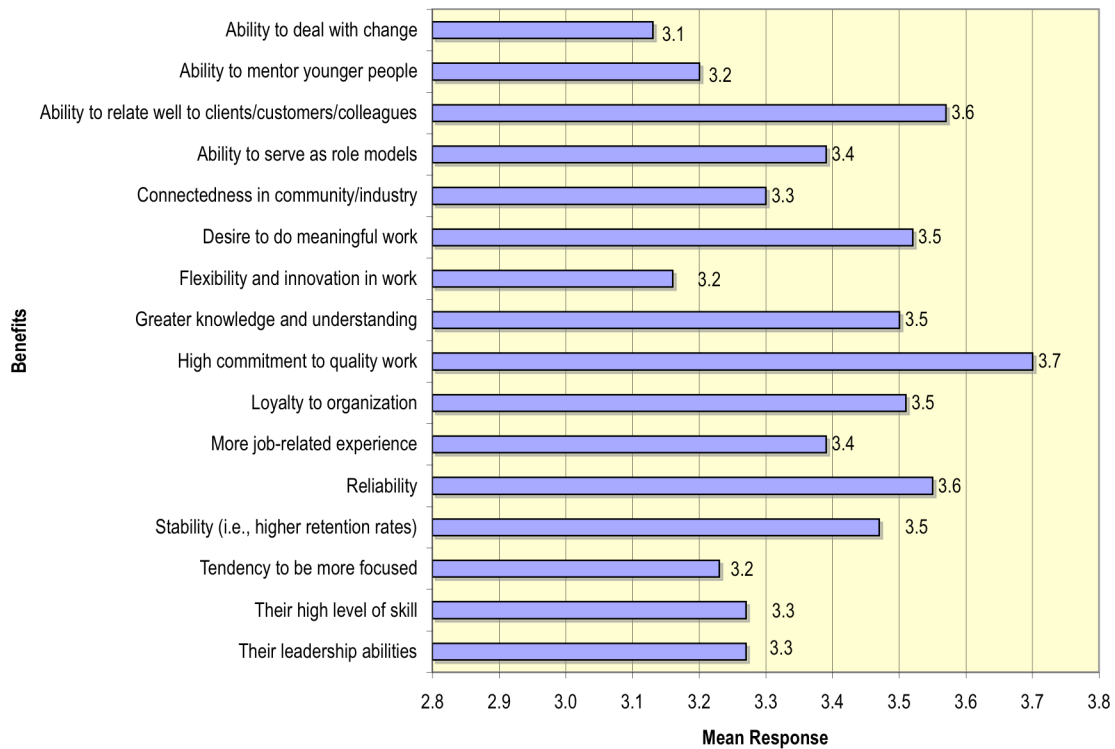
Figure 16. Organizational strategies for retaining 55- to 65-year-old workers



Benefits to hiring boomers Denver area employers also embrace the potential benefits adults age 55 to 65 bring to the workforce. Employers were asked to indicate potential benefits of hiring adults 55 to 65. Figure 17 indicates the mean response scores for the benefits adults age 55-65 bring to an organization. Scores are based on a 4-point scale where 1 represents “not at all beneficial”, 2 represents “somewhat beneficial”, 3 represents “beneficial” and 4 represents “very beneficial.” Most employers in the survey

reported “commitment to quality work” as the biggest benefit (71%). Additionally, employers perceive boomers’ ability to relate well to clients/customers/colleagues (61%) and their reliability (57%) as very beneficial. Least beneficial, although still a benefit to the organization, is their ability to deal with change (40%).

Figure 17. Benefits of hiring 55- to 65-year-olds

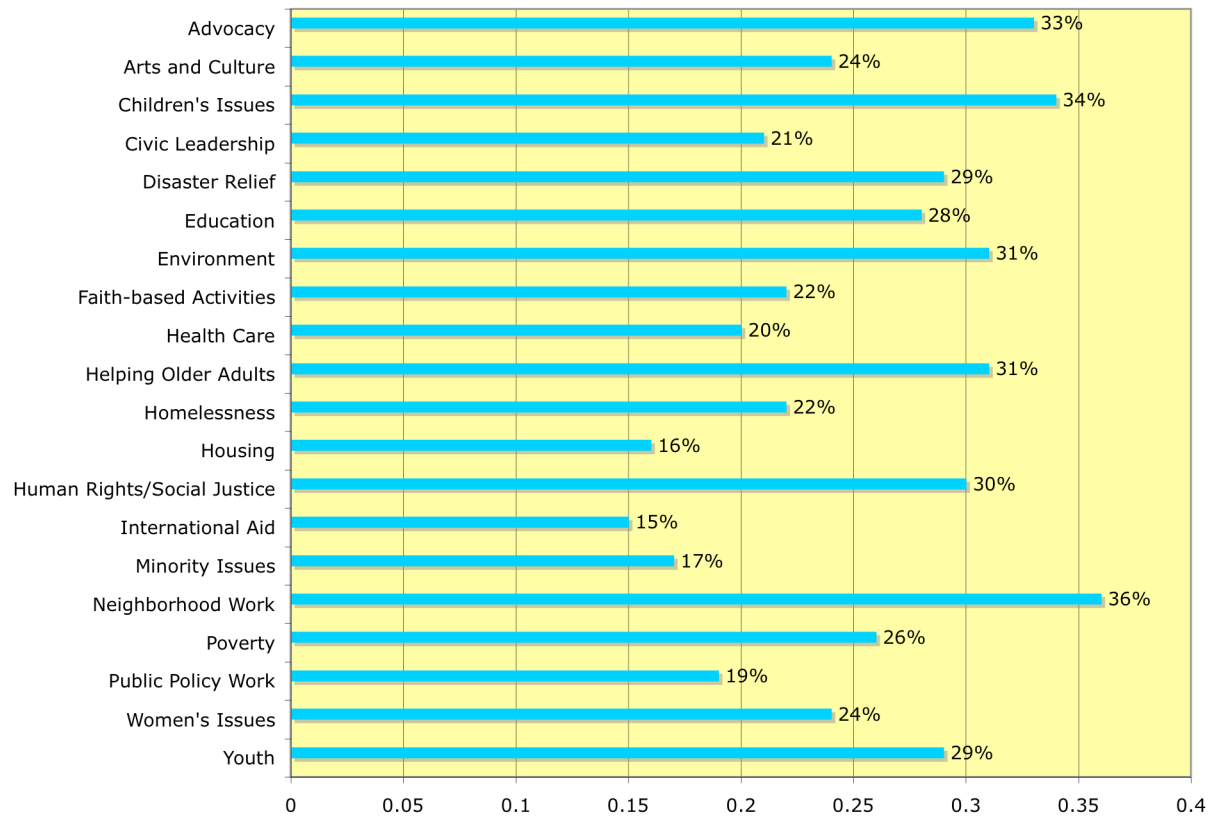


Service

Colorado boomers (born between 1946 and 1964) volunteer at a greater rate than the boomers in the nation as a whole (37.5% vs. 32.2%).⁹ Data also show that 35.6% of 55- to 64-year-old Coloradans volunteer compared with 29.3% of the same age group nationally who volunteer. ***Denver area 55- to 65-year-olds boast a wide and deep commitment to community service, with 57% of survey respondents reporting that they currently volunteer for organizations and projects that help people in the community*** (50% of men and 59% of women). Once again, there is no single issue but many interests, as illustrated in the figure below.

⁹ Volunteering in America. 2007 State Trends and Rankings. Corporation for National and Community Service.

Figure 18. Area interests for volunteering



Comparisons between ethnic groups show that 65% of black/African American respondents volunteer, compared with 49% Hispanic/Latinos and 57% white respondents. As discussed earlier, the on-line survey data indicated that Hispanic/Latinos were less likely to volunteer. However, this was qualified by quantitative data that showed that Latinos do not classify helping friends and family as “volunteering”. It is something that is expected of you as part of your family or community.

Also, 53% of responders who are primary income earners currently volunteer, compared with 64% of responders who are not the primary income earners. In general, volunteering increases as income increases. Yet almost half of those with lower incomes volunteer.

Table 12. Volunteering by income level

	Less than \$20,000	\$20,000 to \$35,000	\$36,000 to \$55,000	\$56,000 to \$75,000	\$76,000 to \$100,000	Over \$100,000
Volunteering	45%	43%	57%	60%	58.0%	69%

“Giving back. ... It’s our duty, our desire.”

Regardless of income, profession, gender or race/ethnicity, for the most part, Denver area boomers will get or remained engaged in some form of activity in the community. This sense of “giving back” was a dominant theme across focus groups and in the over 700 responses to the open-ended survey question asking individuals to describe the next phase of their life. Listen to their voices:

“I think there are a lot of people who don’t even imagine what they can do. They may have volunteered for their child’s group and are not able to extrapolate. Those people need to be educated on volunteerism and the power it has in their lives.”

Boomer focus group

“Baby boomers have a lot of life and work experience that can transition into the nonprofit sector and use those skills.”

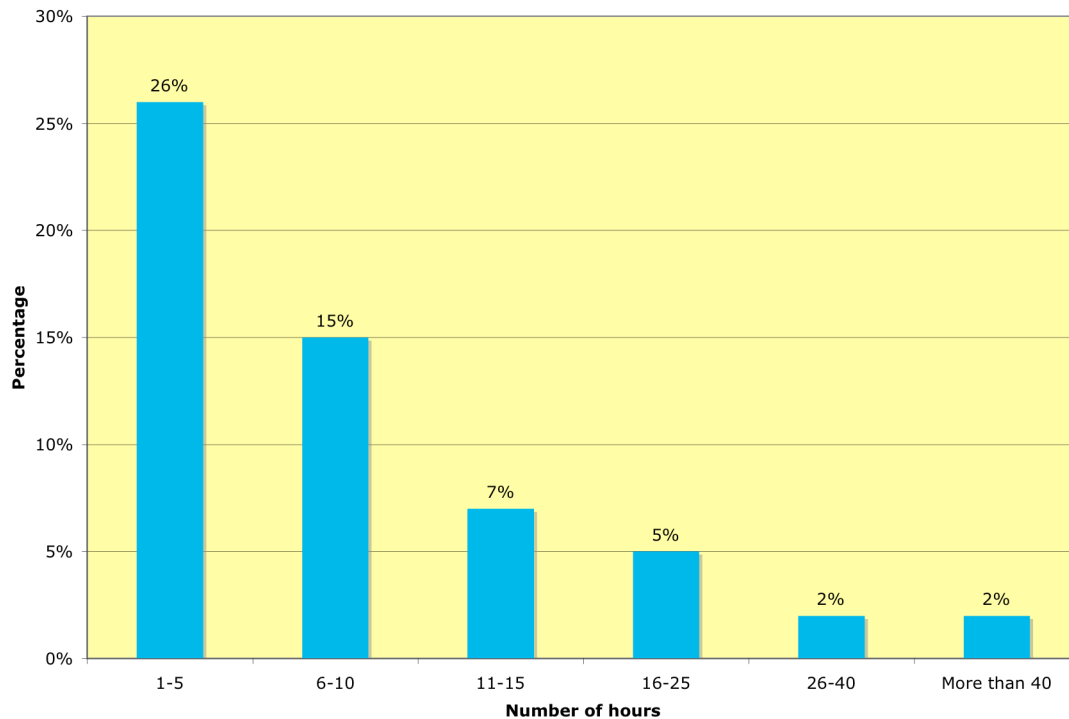
Boomer focus group

“Volunteerism will be really important. ... We can help in the schools, in the hospitals ... affordable healthcare. It’s going to be little things by individuals.”

Union representative focus group

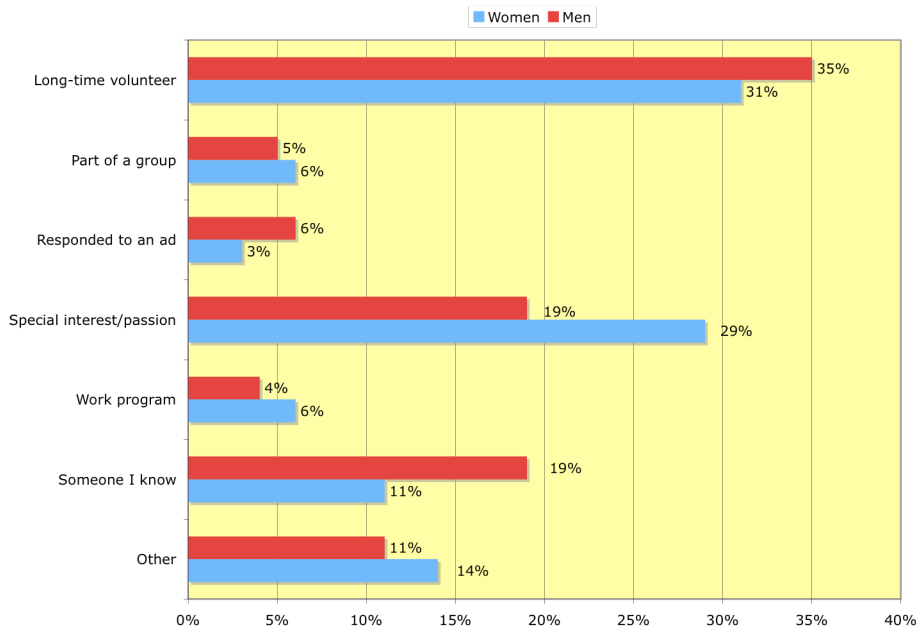
Volunteering and time commitment Of those that volunteer, the majority (26%) of survey respondents report spending one to five hours per month, while 15% spend six to ten hours per month.

Figure 19. Number of volunteer hours per month



Boomers have many reasons for getting involved in volunteer activities, including being a long-time volunteer, having a special interest or being part of a group. When asked to report how they became involved in volunteering, 19% of all 55- to 65-year-olds reported being long-time volunteers, while 15% reported a special interest or passion in a particular area. Other ways that people became involved were through people they know (7%). As shown in Figure 20, a higher percentage of women volunteered because of a passion for a specific area or issue than men (29% compared with 19%).

Figure 20. Reasons for getting involved by gender



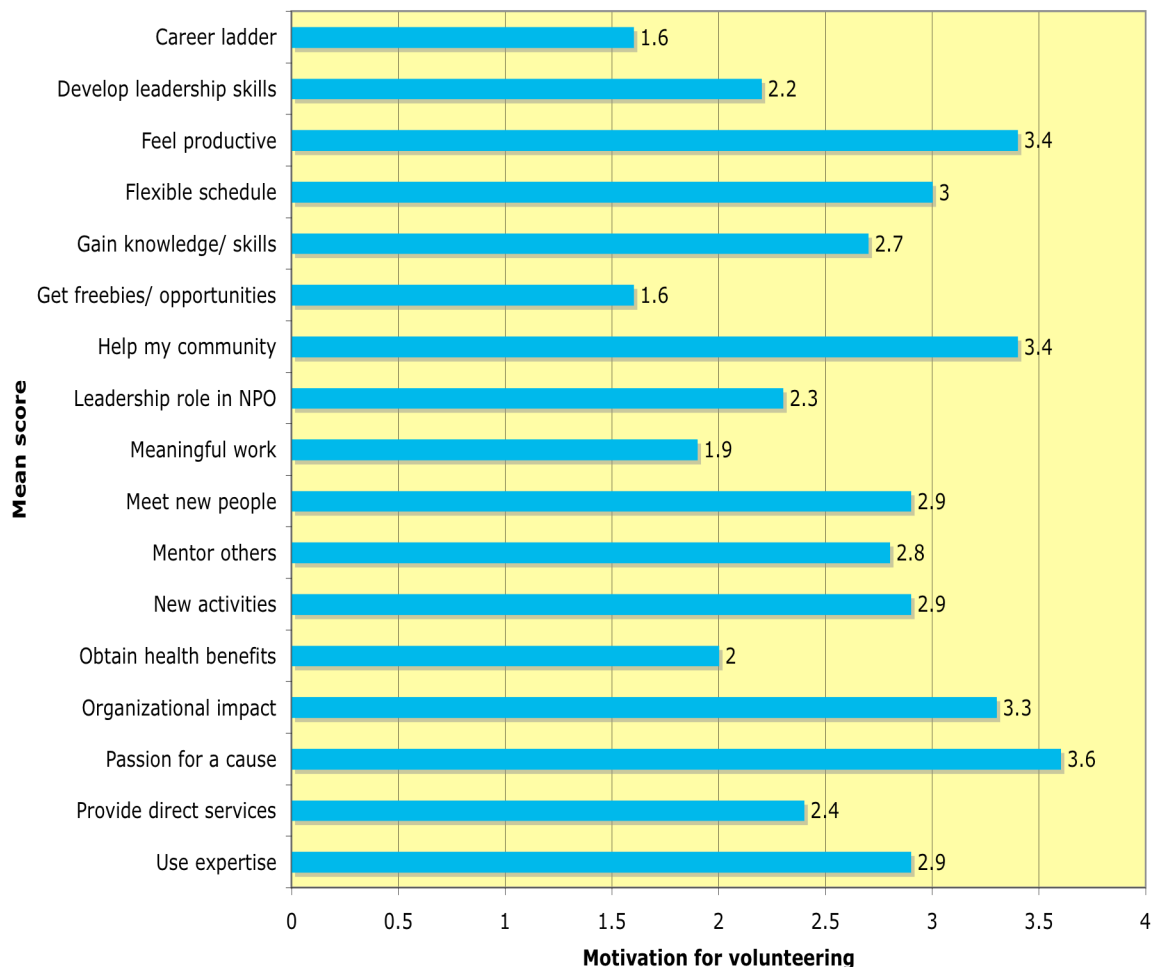
There were also some differences in how respondents of different racial/ethnic groups became involved in volunteering. The top reasons for all groups were long-time volunteer and special interest or passion, however, a higher percentage of Hispanic/Latino respondents were likely to get involved because they were part of a group (24%) compared with black/African American (7%) and white respondents (4%). In addition, a higher percentage of respondents in higher income brackets reported being a long-time volunteer than did respondents in lower income brackets (Table 13).

Table 13. Reasons for getting involved by income

	Less than \$20,000	\$20,000 to \$35,000	\$36,000 to \$55,000	\$56,000 to \$75,000	\$76,000 to \$100,000	Over \$100,000
Long-time volunteer	13%	35%	28%	25.0%	45%	39%
Part of a group	13%	2%	4%	12%	4%	3%
Responded to an ad	0%	11%	4%	3%	6%	2%
Special interest or passion	56%	19%	26%	31%	21%	20%
Work program	0%	6%	9%	7%	6%	5%
Someone I know	3%	19%	12%	17%	8%	14%
Other	15%	8%	18%	5%	10%	18%

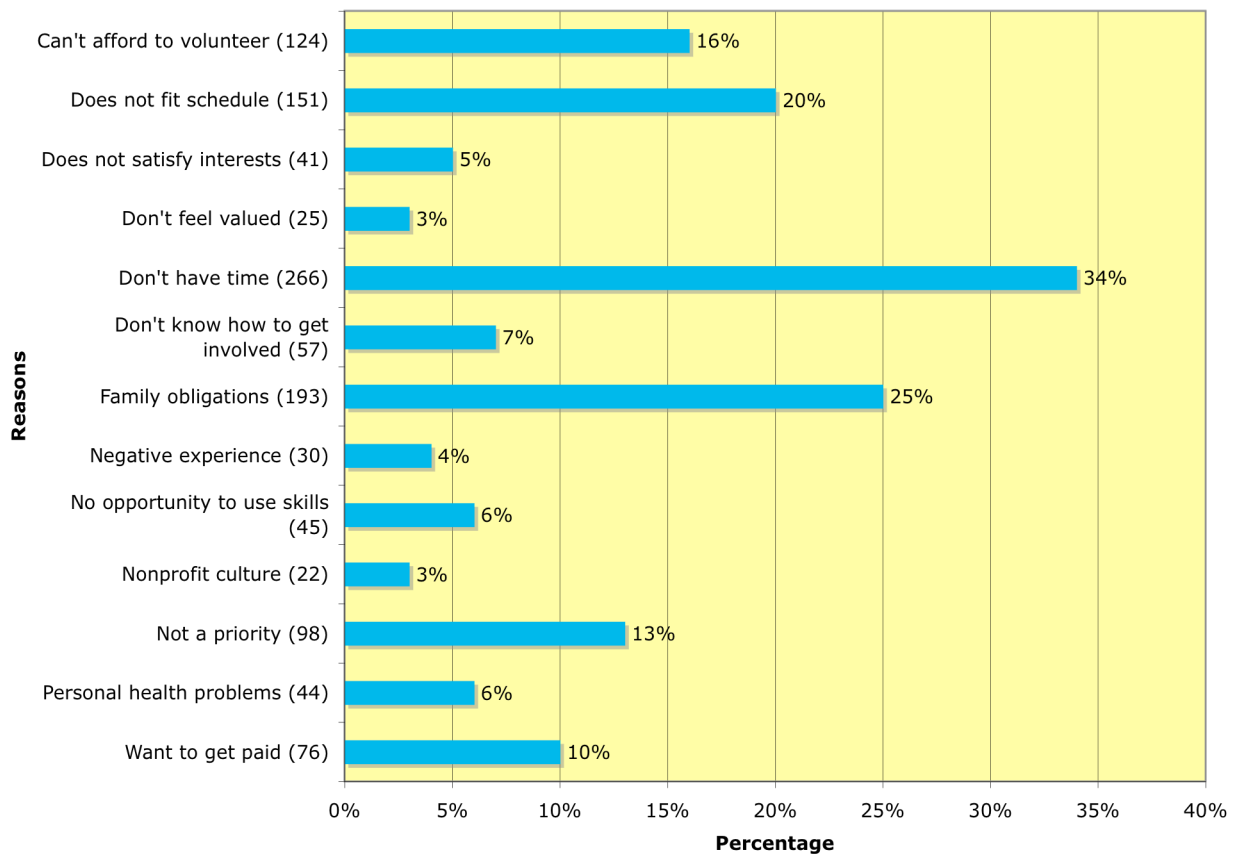
Motivations for volunteering Across the board, boomers volunteer because they care about any issue and want to help their community. When asked to rate the importance of a variety of factors on their motivation for volunteering from 1 to 4, where 1 = not at all important and 4 = very important, most individuals listed *passion for a cause* as the most important motivation for volunteering (3.6). Helping my community and feeling productive rated 3.4, followed by organizational impact at 3.3. Least important motivations were career ladder (1.6) and getting freebies/opportunities (1.6). When looking at gender, ethnicity, income or status as an income earner, there were no differences in motivation ratings.

Figure 21. Motivation for volunteering



Reasons for not volunteering The main reasons for not volunteering include: time (34%), family obligations (25%) and schedules (20%). Presumably this could change for many who change to part-time work or have more free time in the future. Some participants felt they could not afford to volunteer (16%), while others felt it was not a priority (13%) in their lives at this moment. Responses to an open-ended survey question asking to explain reasons why an individual doesn't volunteer support the survey data. Lack of time was cited by most people. Over a third said their jobs were too demanding, or that they needed to look for paid work, or that the combination of paid work or other obligations kept them from volunteering. For others, their reality of their current life circumstance such as personal health issues and caregiving responsibilities interfered with volunteering.

Figure 22. Reasons for not volunteering



Volunteers who had bad experiences ...

While the overwhelming response toward volunteering was excitement and a positive experience, many volunteers who had negative experience detailed them at length, giving a disturbing contrast between the idea and the reality of some volunteer experiences. Most cited that the sponsoring organizations **did not effectively use their expertise**. A related challenge cited was **unskilled/untrained volunteer coordinators** who could not appropriately place volunteers. Several volunteers cited that organizations were not prepared for them when they showed up to volunteer, that there were too many volunteers in some cases, and that the existing volunteers were poorly managed. Related to that was a feeling that many **existing volunteer jobs were meaningless**. A significant number had been discouraged by the **“clickiness” of existing volunteers** within an organization. The overriding theme was that many volunteers felt unappreciated. *“No attempt was made to thank me for all of the work I had done (including personal donations).” “The volunteer coordinator was not skilled in valuing volunteers and understanding that they are not paid staff and therefore need a different style of supervision and leadership.”*

For the most part, responses did not differ for women and men. There were some differences in responses by racial/ethnic group. Black/African American respondents were more likely to report that they cannot afford to volunteer (25%) compared with Hispanic/Latino (17%) and white (16%) respondents, and they were less likely to list time as a factor (18%) compared with 33% Hispanic/Latino and 36% white respondents. Hispanic/Latino respondents were more likely to report family obligations (33%) as a factor compared with black/African American (21%) and white (25%) respondents, as well as volunteering as a low priority (23%) compared with 5% black/African Americans and 11.3% white respondents. Finally, white respondents were more likely to list scheduling as a factor (22%) than respondents in the other two groups (3% black/African Americans and 12% Hispanic/Latino).

When comparing by income level, respondents with lower income are more likely to report that they cannot afford to volunteer and would like to get paid than those with higher incomes. Additionally, the ability to volunteer varied across respondents in different income brackets.

Table 14. Reasons for not volunteering by income level

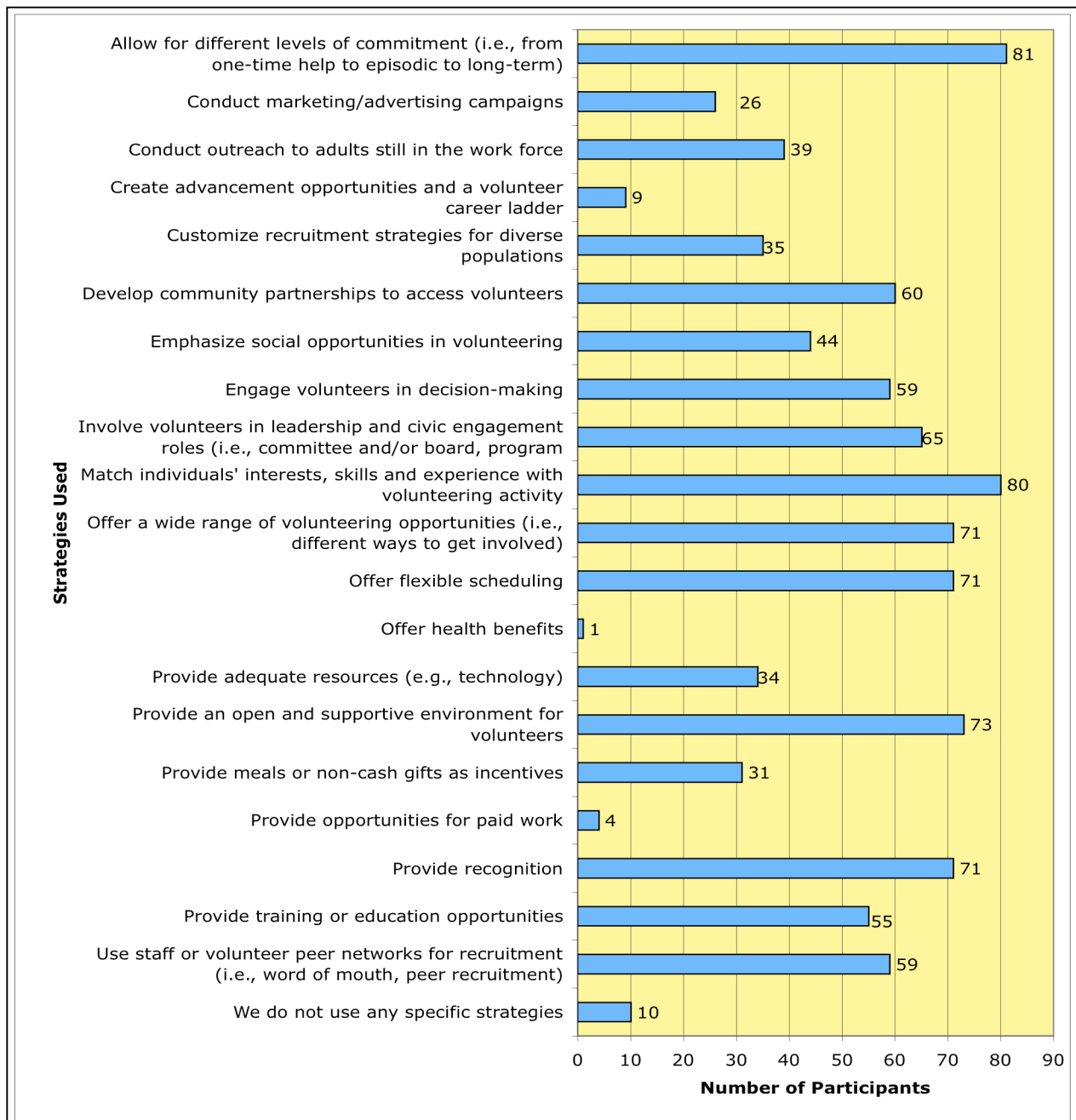
	Less than \$20,000	\$20,000 to \$35,000	\$36,000 to \$55,000	\$56,000 to \$75,000	\$76,000 to \$100,000	Over \$100,000
Cannot afford to volunteer	53%	26%	9%	15%	2%	4.0%
Would like to get paid	21%	19%	6%	8%	7%	5%
Do not have the time	31%	24%	30%	47%	34%	39%

What nonprofits and service organizations say about boomers Almost 200 diverse service organizations responded to the Web-based survey from the six-county area, with the majority of organizations from Denver County. Most of the organizations represented in the sample were nonprofit agencies, with a few government agencies, foundations and educational institutions. Organizations' use of volunteers ranged from six to more than 500, and at least 30% of volunteers were age 55–65, primarily women. About half of the agencies use a dedicated volunteer coordinator. Almost all of the organizations report using specific strategies to recruit and retain volunteers age 55–65. The most often-reported strategy is providing flexibility in terms of level of commitment, hours and scheduling. Organizations also try to match activities with skills and interests.

These strategies are directly aligned with what respondents felt that volunteers in the demographic want most from their volunteer experience. Respondents reported many benefits of using volunteers age 55–65, including experience, work ethic and flexibility. They reported very few challenges, other than volunteers' lack of time. Finally, respondents believe their organization is motivated to engage volunteers age 55–65 and feel they have the infrastructure and policies to attract and retain them.

In general, allowing volunteers a different level of commitment is a strategy organizations use to recruit and/or retain volunteers (79%). Additional strategies they use include matching individuals' interests, skills and experience with volunteering activity (78%), providing an open and supportive environment for volunteers (71%), providing recognition (69%), and offering a flexible schedule to volunteers (69%). The least-used strategies to recruit and retain volunteers are creating advancement opportunities and a volunteer "career ladder" (9%), offering health benefits (1%) and providing opportunities for paid work (4%).

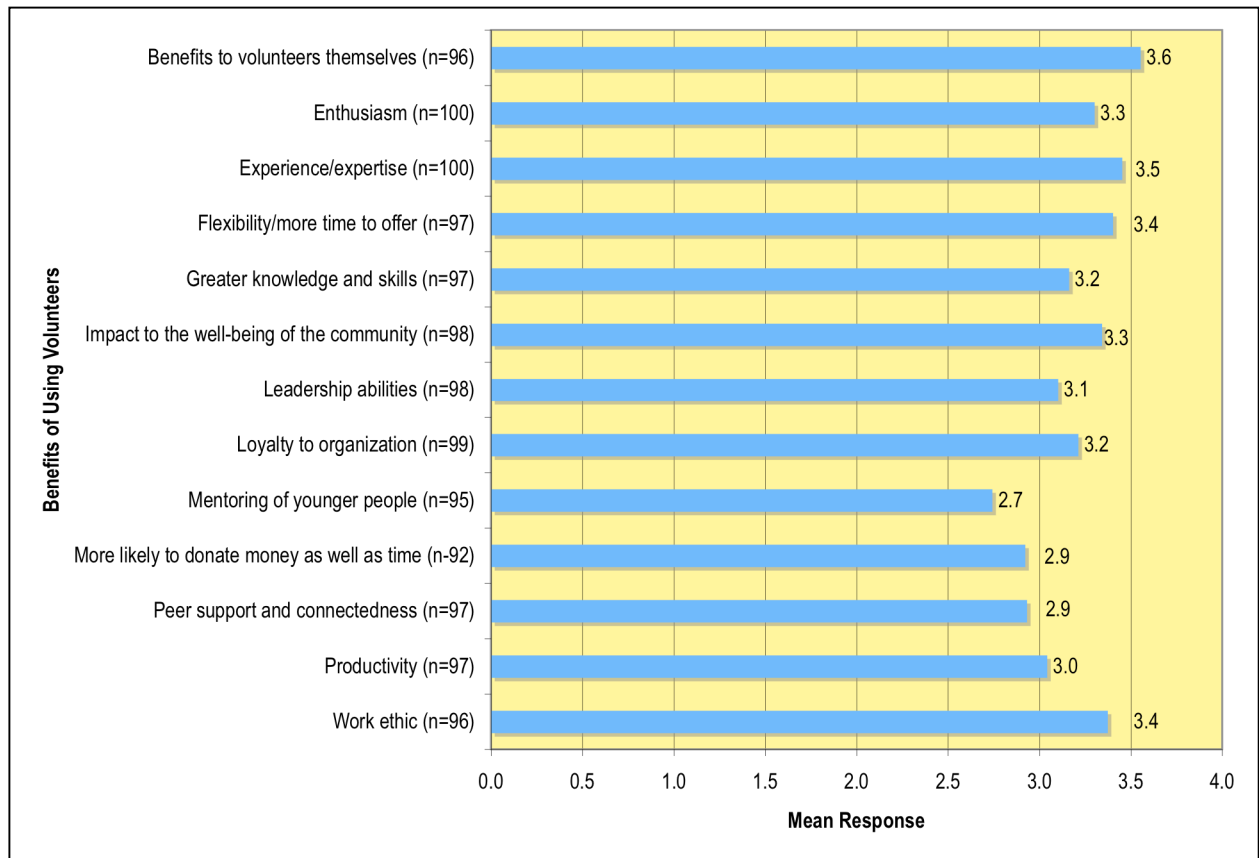
Figure 23. Strategies used to recruit and/or retain volunteers



Trends in volunteering Survey participants noted many trends that they see in volunteers age 55–65. The biggest trend is that volunteers 55–65 want more flexibility in scheduling. Many volunteers need to schedule around other activities such as employment or family obligations. Others want the flexibility to schedule volunteering around other activities such as travel or hobbies. Other trends noted by participants are that there are more women volunteering in this age group, that volunteers want to contribute to something bigger than themselves, and that they seem to be more skilled and interested in using their skills in their volunteer work. Volunteers in this age group want to feel connected to the community and use their skills in a meaningful way. Thus, they are selective about the type of volunteer work they are willing to do. One participant noted that these volunteers are more skilled in technology and management, and another noted a preference for more “hands-on” work with youth and adults in nursing homes. Two respondents noted that there seem to be fewer volunteers in this age group. Participants also reported a lack of Spanish speaking volunteers.

Benefits of volunteers age 55-65 Overall, survey participants responded favorably to the various benefits that volunteers between the ages of 55 and 65 bring to their organization (Figure 24). Scores are based on a 4-point scale, with 1 representing “not at all beneficial,” 2 representing “somewhat beneficial,” 3 representing “beneficial” and 4 representing “very beneficial.” The majority of participants reported the benefits to volunteers themselves (61%), having experience or expertise (58%), work ethic (48%), and flexibility/more time to offer (51%) as very beneficial. Additional comments regarding benefits to having volunteers in this age group include their dependability, reliability, level of commitment and that they are willing to do whatever is needed for the organization.

Figure 24. Benefits to using volunteers age 55-65 *Note: Number of respondents is in parentheses



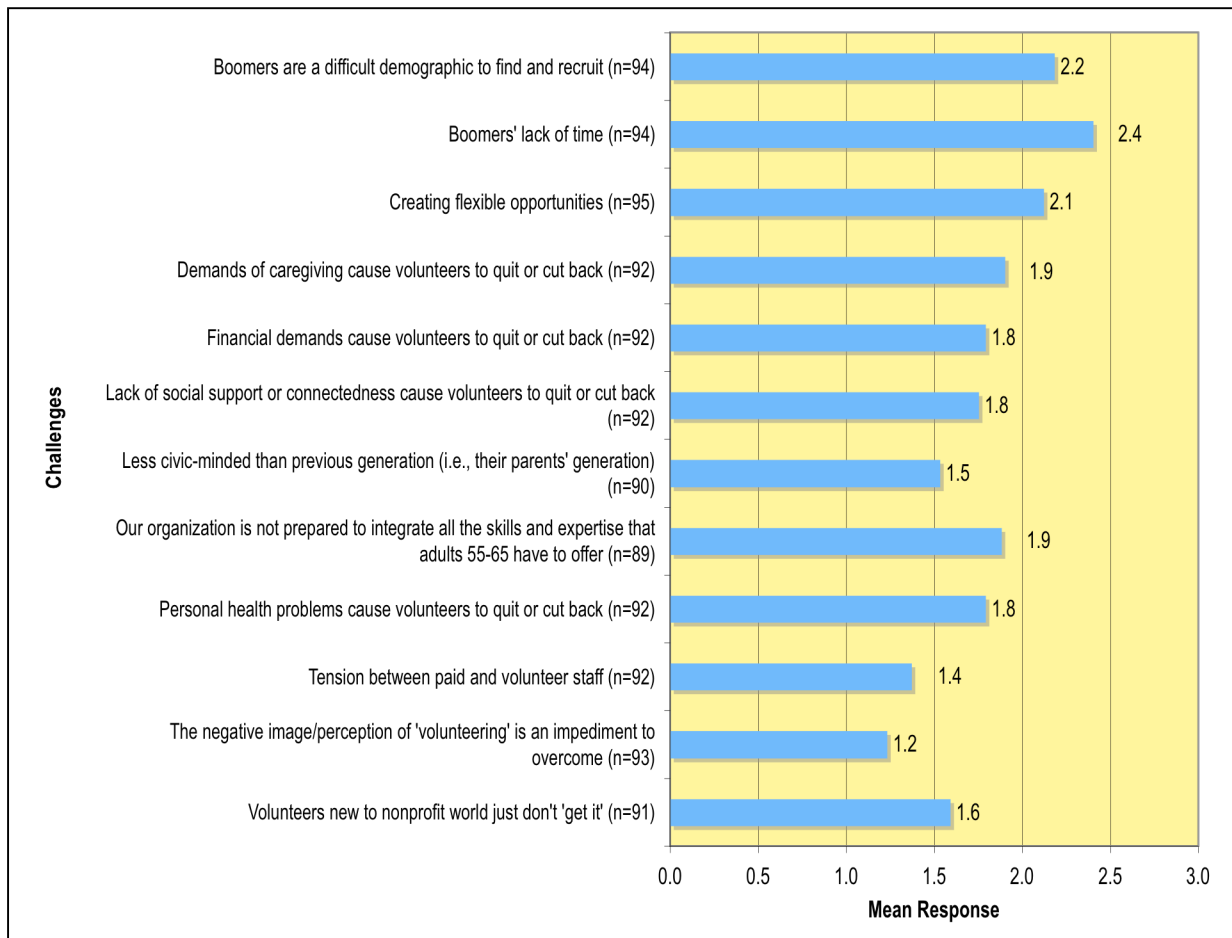
“Working for the government or a nonprofit. ... It’s hard to oversee people who want flexibility and freedom. We had an older woman working part time and she had grandchildren and wanted to see them.”

Denver area boomer

Challenges to 55 + volunteers Survey participants also responded to statements pertaining to challenges in recruiting and/or retaining volunteers age 55–65 (Figure 25). Their responses are, again, on a 4-point scale, with 1 representing “not at all challenging,” 2 representing “somewhat challenging,” 3 representing “challenging” and 4 “very challenging.” The majority of participants perceived minimal challenges in recruiting and/or retaining volunteers in this age group. The areas where participants reported some amount of challenge include boomers’ lack of time (41%), difficulty identifying and recruiting (40%), and trying to create flexible opportunities (42%).

However, the vast majority of respondents reported recruiting and/or retaining boomers to not be a real challenge.

Figure 25. Difficulties with recruiting/retaining boomer volunteers



Overall, **survey respondents believe their organization is motivated to engage volunteers age 55–65** (83% agree or strongly agree), and that they have the infrastructure and policies to attract and retain volunteers age 55–65 (61% agree or strongly agree). Respondents noted several models or programs that are successfully engaging adults 55–65 in service to their communities. (See figures below). They include Metro Volunteers; Denver RSVP; Habitat for Humanity; Big Brother/Big Sister; and various hospitals and museums.

Figure 26. Motivated to engage volunteers age 55–65

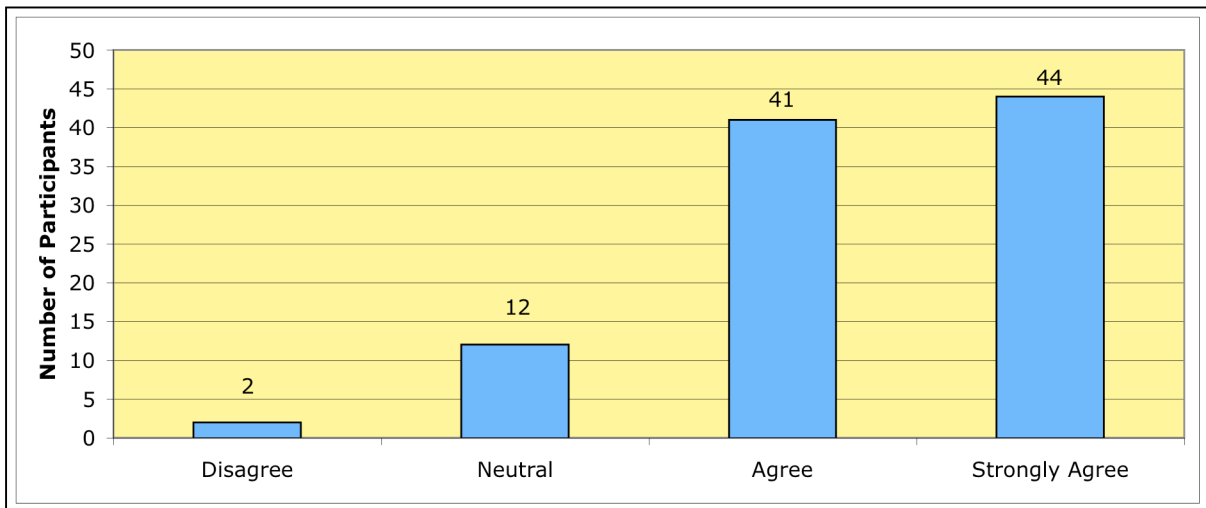
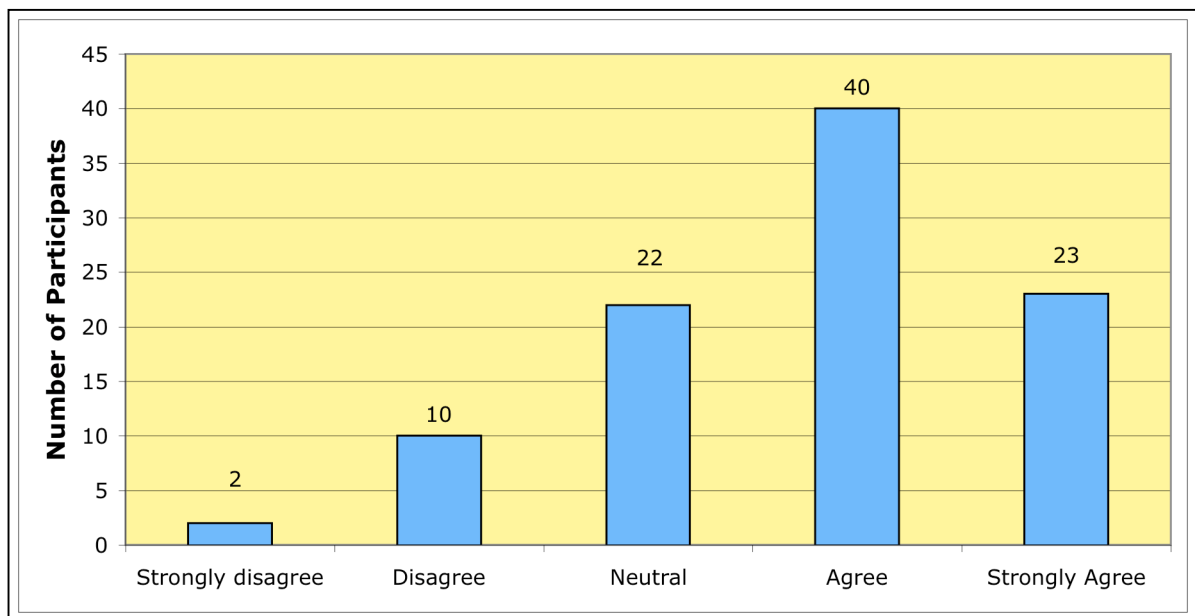


Figure 27. Infrastructure and policies to attract and retain volunteers age 55–65



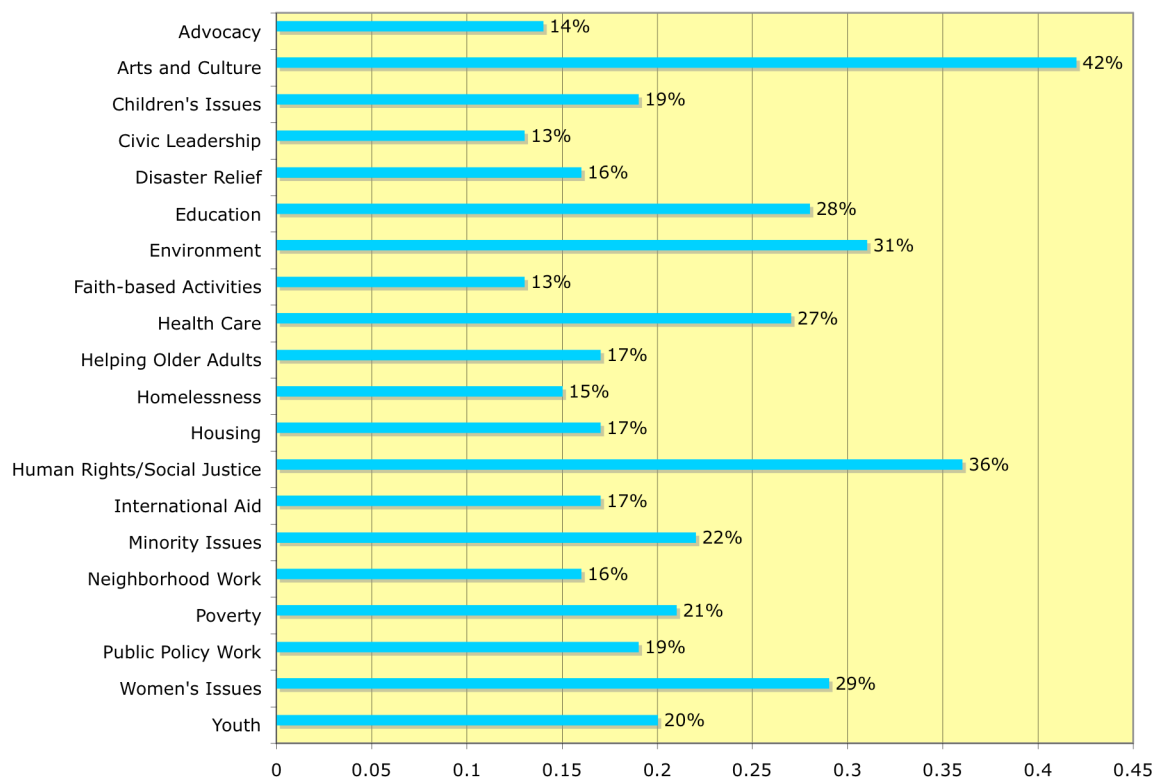
Learning

“I’d love to go back to school and learn something new. Maybe apply it to a new job, or even help me to start a new career. I just know that I don’t intend to sit home.”

Mile High boomer

Denver area boomers want to participant in lifelong learning in a broad array of areas. When survey respondents were asked to identify the areas they were most interested in learning, each area garnered at least 13% interest. Moreover, in the survey, **65% of all boomers reported wanting to participate in lifelong learning.**

Figure 28. Interest areas for learning



By income Comparisons by income level show that interest in enrichment and lifelong learning, lectures/symposiums and workshops/seminars increases with income level, while interest in job training programs is higher for respondents in lower income

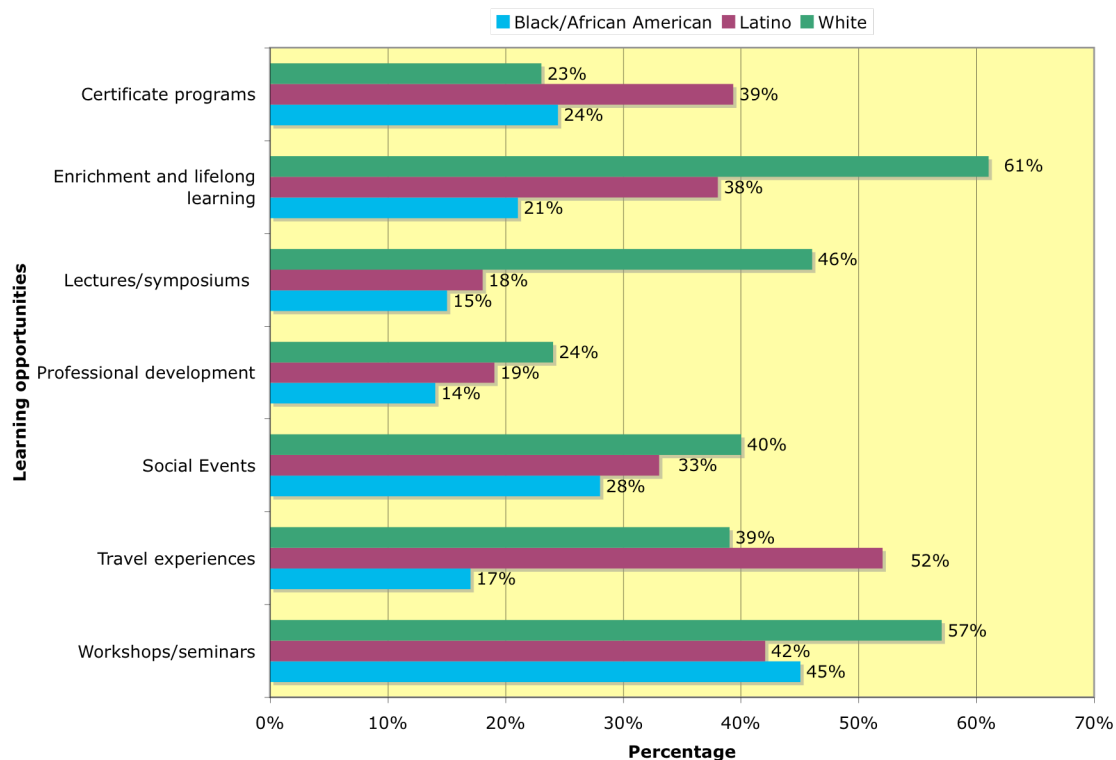
brackets. Interest in job training programs is higher for respondents in lower income brackets (Table 15).

Table 15. Types of learning opportunity by income level

	Less than \$20,000	\$20,000 to \$35,000	\$36,000 to \$55,000	\$56,000 to \$75,000	\$76,000 to \$100,000	Over \$100,000
Enrichment and lifelong learning	47%	40%	43%	58%	69%	73%
Job training program	36%	32%	26%	14%	12%	5%
Lectures/symposium	33%	28%	32%	40%	48%	62%
Workshops/seminars	45%	51%	45%	57%	63%	66%

By race/ethnicity Differences in desires for opportunities for learning are also influenced by race/ethnicity. Whites are more likely to want enrichment and lifelong learning opportunities (61%), Latinos are more likely to want travel experiences (52%). Blacks/African Americans tended to want the opportunity to attend workshops and seminars (45%) above any other learning opportunities (Figure 29).

Figure 29. Learning opportunities by race/ethnicity



The telephone survey revealed that 32% of respondents were interested in taking classes for job training, however, 53% would like to take classes for the love of learning. Latino respondents were more likely to be motivated by socializing with others (34%) and increased salary compared to African-American and white respondents.

Learning opportunities JVA surveyed nine university and five alternative providers of lifelong learning opportunities in the Denver metro area and conducted more in-depth interviews with other educational representatives. The number of students served by these organizations in the 55–65 age range varied widely, although most reported that they served more women than men. About half the survey respondents noted an increase in the number of 55+ students, and most anticipate this number will continue to grow over the next five years. Respondents also believed that students in this age demographic seek education primarily for self-improvement and love of learning. Topic areas of interest varied widely, with the most popular fields of study: arts and culture; nonprofit management; social services; and technology. The majority of respondents reported offering a wide range of learning opportunities to attract 55- 65-year-olds, including courses for college credit, courses for non-college credit, workshops/seminars and lectures/symposiums. The many benefits to serving older students, include greater dedication, experience and enthusiasm.

“The systems and infrastructures aren’t in place in the university system to help boomers navigate educational opportunities,” stated a recently retired higher education professor. She explained that often times not only do boomers not know how to access educational opportunities at the college level, or even who or where to call, but the university itself doesn’t always know where or how to place these individuals.

While there are many programs designed to provide lifelong learning for adults, when boomers want to return to school for a specific degree or training after years in the workplace, the challenge is how and where to place them to meet their unique needs.

The primary reasons for learning cited in focus groups and in open-ended survey questions that were not included in the standard survey responses were:

Learning new things The majority of respondents want to learn new things, including new skills, learning another language, and interest in developing more knowledge about specific topics and issues. Many also reported interest in learning a new hobby or developing deeper skills around a longstanding hobby.

Keeping mentally alert A significant percentage wanted to “keep their brain active”; others cited the mental and physical health benefits of lifelong learning.

Helping others A significant number of boomers were motivated by lifelong opportunities that would help them “give back” to the next generation, have community impact or help others. Some reported a religious motivation to help others.

Personal growth, nurturing creativity and simply having fun were also common themes.

Career development Finally, a minority of boomers were interested in continuing education to further their current careers or to obtain a new credential.

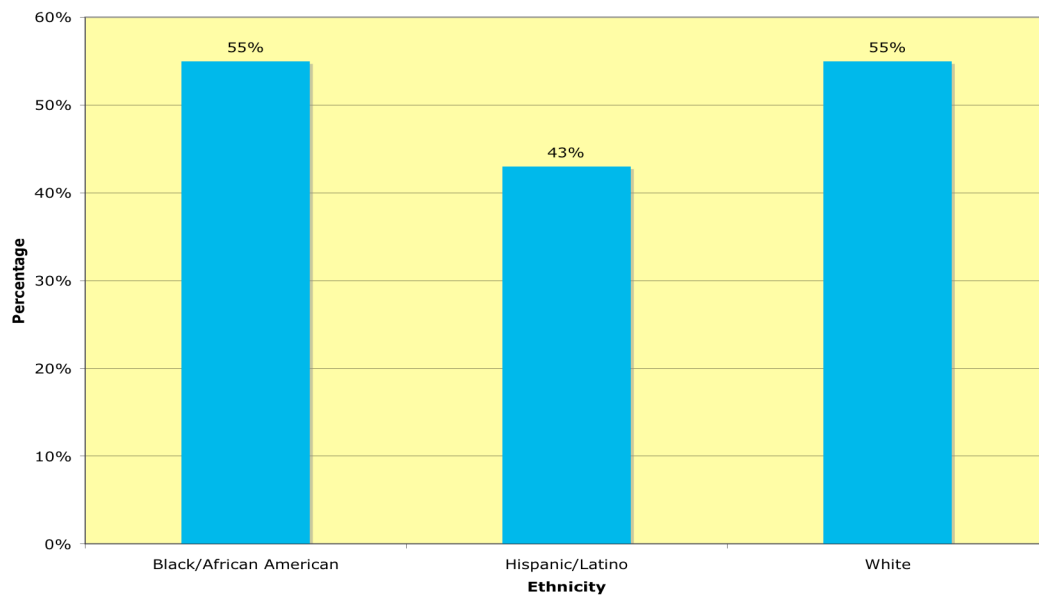
“One of the big frustrations ... in reentering the university system is there is zero flexibility to enter without going through every detail of the system,” explained one woman who had recently retired from 30 years as a director of human resources. She decided to pursue a master’s degree in counseling psychology. But the systems weren’t in place to ease this career transition. *“I had to take the course on human resources that I could have taught!”* she explained in frustration.

“There should be recognition of professional experience in exchange for more formal coursework,” she said.

Do boomers know where to go to access civic engagement opportunities?

The survey asked individuals if they know where to go to find what is next, whether it be a job, a volunteering or service opportunity, or an educational experience. In response, 54% of survey respondents said “Yes” and 42% said “No.” Comparison by race/ethnicity reveal that fewer Hispanic/Latino respondents (43%) know where to go compared with 55% of black/African American respondents and 55% of white respondents as shown in the figure below.

Figure 30. Know where to find information by race/ethnicity

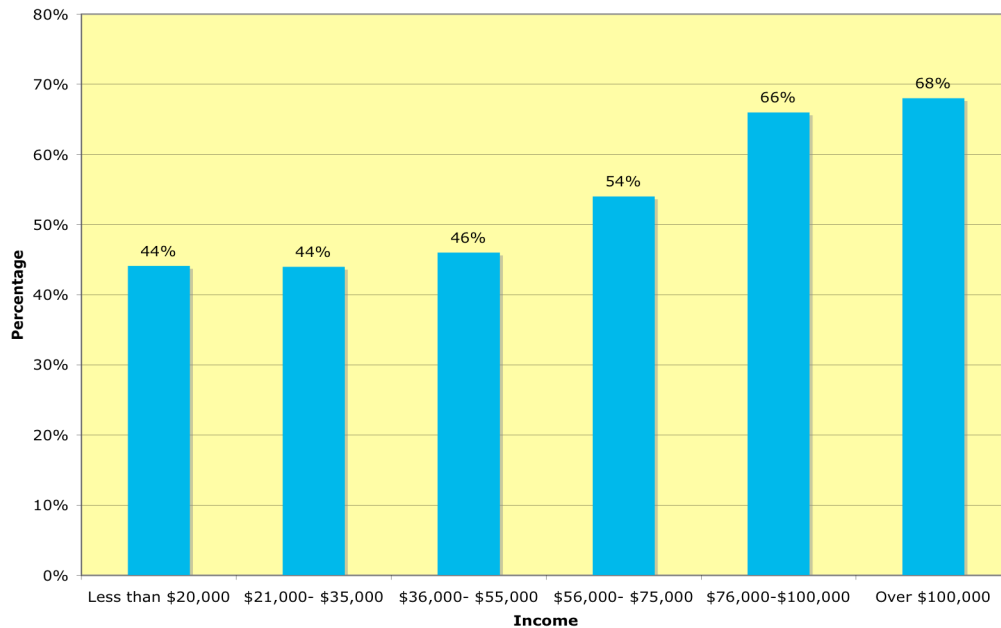


“Where’s the entry point? There’s all this talent ... but let’s have a clearinghouse of what talent is available and then it could be connected to community needs.”

Women’s focus group participant

By income Comparisons by income show that as income increases, so does the percentage of respondents in each income category that report knowing where to go for information (Figure 31). Interestingly, a higher percentage of women (57%) report knowing where to go for information than men (40%).

Figure 31. Know where to find information by income



What should a resource for boomers look like?

“There needs to be a creation of organizations for baby boomers to pick from the service that they offer.” *Union representative focus group member*

The assessment research strongly supports the importance for a virtual, social *and* physical network to connect boomers with future opportunities for civic engagement. In other words, there is **no one place** to which all boomers will go.

Social networks Focus group members stated repeatedly how they would rely on their personal networks to help them with “what’s next.” Latino focus group members cited informal mechanisms, trusted friends and community organizations. As one Latina said, *“We meet in coffee shops and talk.”* Many African American focus group members talked about using their church community for contacts and support. Other boomers described friends, business contacts or groups to which they belong as important resources. As one focus group member envisioned: *“A center that really houses a lot of different areas to help out: spiritually, physically and emotionally, not just one single area.”*

The next steps and where to go

"We're all individuals right now trying to do something. If there was a large resource where we could come in and find out what's out there..."

Boomer focus group participant

There is **no one place** where boomers will go to learn about future civic engagement. Focus group results indicate that boomers will seek out a variety of sources through individuals, their social networks and connections.

"A lifelong learning counselor—someone to help me with a plan."

"A clearinghouse matching talents and interests ... with community needs."

"A center that houses spiritual, physical and emotional help."

"It has to be credentialed."

Some boomers would like to access organizations known to them, trusted networks to help them learn about and get involved in new ventures.

As one teacher stated, *"I would like to see offerings through the Colorado Education Association for people like me. I'm coming up on retirement; someone to help me make a plan."*

When asked in an open-ended survey question, "Where would you go to find out what is next for you be it a job, a volunteering or service opportunities, or an educational experience?" individuals report a combination of sources they might access: Internet, friends, social networks, word of mouth, church or synagogue; colleges; newspapers, AARP, nonprofit organizations and professional contacts. When one focus group member described a potential resource as one *"like Google, where you could be at home,"* another counters with, *"We need more face-to-face interaction."*

Make it easy and organized Focus group participants discussed elements to ensure a successful model for matching interests and talents with opportunities and needs.

"There needs to be a creation for baby boomers to pick from the service that they offer."

Union focus group

"People don't know where to go to get information. It's all so scattered; that does people in."

Teacher focus group

"It needs to be organized for them. Habitat for Humanity is a great model."

"Organizations like that, and like Teach for America, had made things...easy to do because it is organized. And you feel really good that you are doing it."

Teacher focus group

VI. FUTURE CONSIDERATIONS AND PROPOSED INITIATIVES

Through this mixed-methods needs assessment design, Rose Community Foundation has a much deeper understanding of the interests and opportunities, as well as the challenges, facing adults age 55 to 65 in civic engagement in the Denver metro area. The project itself created a momentum in the Denver community for thinking about the potential for systems changes, processes and opportunities for individuals and the larger community initiative to engage individuals. It has generated exciting discussion about individual and collective action to tackle a variety of community needs.

The wealth of information obtained from this community assessment has resulted in the proposal for several interesting opportunities for program development. Among those in initial conceptual stage include:

- **A Clearinghouse or Network of Resource Centers.** A key theme that emerged from the research is that boomers connect to resources and information through a variety of sources, including the Internet, but that much information is derived from personal and professional networks. This may include community groups, churches, professional associations and others. Most reported that they felt more comfortable accessing information about what to do next through sources with which they were already familiar. ***A resource must be physical and virtual and linked to existing social networks.***

Institutions and organizations that are looking to engage boomers will need to consider a variety of ways to outreach to this age group through different venues. As one focus group participant explained, *“We go to the people we trust.”*

A key part of this effort would be to offer a series of educational opportunities that would provide individuals with information they need to make informed decisions about opportunities available to them, especially in employment and community service. Ideas from the Community Advisory Committee suggested that the Foundation could play a “connector role” in the community, e.g., host fairs with interested groups of nonprofits and employers; explore different kinds of delivery systems: re: natural ways people group together, such as homeowners associations,

schools, faith-based groups, political groups.

- **A healthcare initiative.** Across socioeconomic groups, gender, race/ethnicity and other factors, two common themes emerged: 1) access to healthcare benefits is the huge determining factor that will influence what boomers feel they can do next; 2) and access to healthcare is an issue that boomers may be able to influence because of their sheer numbers. There is interest in further exploring potential models for tying healthcare benefits to volunteerism and part-time, flexible work, as well as harnessing the passion and experience of boomers into longer-term, more comprehensive healthcare reform. The Community Advisory Committee explored ideas such as looking at volunteerism vs. pay; developing healthcare packages for volunteers; and investigating options for healthcare resources and advocacy.
- **A capacity building initiative** across all areas of civic engagement – work, service and learning. Another key theme that emerged from the assessment was the disconnect between the organizations that typically offer opportunities for volunteerism and community service, and the boomers who want to use their skills and experience to benefit their communities. This was true not only in nonprofit organizations, but also government agencies, employers and institutions of higher education, which may want boomers to enroll or work in their programs/work but have bureaucratic requirements that boomers resist. Organizations need to look at the policies, practices and systems that discourage boomers from future meaningful civic participation and build the capacity of community organizations and institutions to meaningfully engage boomers in the next phase of their lives. This might include creating a hub/resource center for people to learn about volunteer opportunities or building the capacity of volunteer coordinators in nonprofits to address interests and needs of potential boomer volunteers, or exploring the intersection between higher education and volunteers—development of volunteers and utilization of continuing education to help address volunteer training.
- **Career transition training.** In response to the significant percentage of middle- and low-income boomers who intend to continue earning a living beyond age 65, it will be important to create opportunities for them to become trained in different job skills, learn how to start and operate a business or earn income through self-employment.

Many boomers foresee leaving full-time employment to work part time, but they will still need to earn sufficient income to meet living expenses. Many of the part-time opportunities currently available to older adults are low-skill jobs that pay poorly. A career transition training initiative would be designed to train 55-plus adults for jobs that offer pay and benefits commensurate with higher-level skills and/or professional qualifications. Training in small business startups and self-employment are additional options to address needs for income and flexibility.

Conclusion Through the mixed-methods assessment, those who utilize this report will have a much deeper understanding of the interests and opportunities, as well as challenges, facing adults age 55-65 in civic engagement in the Denver metro area. The project itself created a momentum in the Denver community for new ways to think about and harness "the experience dividend" of the boomer generation. It also generated exciting discussion about individual and collective action to tackle a variety of community needs – an exciting road ahead for boomers leading change.

Appendices

- A. Annotated Bibliography
- B. Survey Instruments
- C. Focus Group and Interview Protocols
- D. Community Advisory Committee

Appendix A
Annotated Bibliography

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Literature Review, January 2007

A comprehensive literature review was conducted of published reports, peer-reviewed journal articles, books, Web sites, news articles and other sources of information relating to boomers' employment, service and learning. Local, national and international sources were examined. A selection of articles are synthesized and presented next. The articles that were selected are significant (i.e., well-known), address current issues and themes, and are relevant to Rose Community Foundation's Boomers Leading Change initiative. These articles are deemed representative of the overall literature on boomers. Articles that had specific information pertaining to policies and practices that limit boomers' participation in employment, service and learning were included.

Martin, S. (2006). *Baby boomers, adult service learning and transformative volunteer experiences, part 1*. Volunteer Management Review (eNewsletter). www.CharityChannel.com.

Service learning is an educational method that combines experiential learning with community service. Research shows that older adults are largely left out of structured service-learning opportunities. Some reasons for this include the lack of experience in designing service learning activities, few resources and reluctance to provide enrichments that might diminish the altruistic motivation of volunteering. Additionally, while youth are naturally seen as learners, many practitioners have the false conception that older adults are no longer interested in developing capacity. The "new" senior is more active and healthier than before. Many are taking courses at colleges or universities, traveling around the world, signing up for classes at their senior centers. Later life has become a time of continued growth and learning. Volunteer resource managers are looking for help in incorporating adult service learning into their programs in an attempt to attract and retain boomer volunteers. Therefore, lifelong learning will become an indispensable ingredient of a quality volunteer experience. It is likely that service learning will be presented in new ways that will make more sense to adults. Adults want to learn things they can apply now to make their lives better (versus learning for learning's sake). Service learning as "personal growth" or even "transformation" is a theme that is likely to resonate with baby boomers.

A transformative volunteer experience (TVE) is a volunteer experience that fundamentally alters the way we perceive ourselves, others and the world and creates lasting change in the physical, emotional, spiritual, social or occupational dimensions of life. A survey of volunteers who had experienced life-changing experiences through volunteering revealed the following:

1. TVEs can happen at any age but seem to most likely occur in adulthood.
2. TVEs can take place through a wide variety of volunteer activities. From one-on-one volunteer activities, to volunteering in a disaster, to fairly ordinary and less demanding situations.
3. TVEs usually happen gradually over time but can occur quite suddenly.
4. TVEs are often associated with a major life transition or crisis.
5. TVEs are sometimes triggered by an encounter with new people, situations or cultures. Volunteering often exposes people to people and situations that they would not otherwise encounter in their day-to-day life. These experiences can become transformative by expanding their sense of self or by giving them a new appreciation for what they have.
6. TVEs can result in career changes.

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7. TVEs impact multiple dimensions of one's life. They affect the whole person in lasting ways. Some of the frequently mentioned changes were: a sense of better health and well-being, increased energy, the learning of new skills, more openness to new ideas, a greater sense of meaning, greater empathy for others and respect for diversity, the confirmation of skills they thought they had but had not used.
8. TVEs are associated with reflection (i.e., keeping a journal or talking to others).

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Charness, N., & Czaja, S.J. (2006). *Older worker training: What we know and don't know*. Washington, D.C.: AARP.

Many employers have reservations about older workers' technological competence and ability to learn new technology. This report summarized the literature (i.e., gerontological, psychological and human factors engineering literature) on the ability of older persons to learn new skills, and it highlights training issues and questions that must be addressed to ensure the productive employment of older men and women.

Given the continual influx of technology in most workplaces and the subsequent change in work demands, training is an issue of critical importance to everyone. Older workers usually have not had recent training, so the need for training and retraining programs is even more crucial. Employers need to ensure that opportunities for training and retraining are available for older people and that training programs are designed to meet the learning needs and preferences of older adults. This is critical to "learning success."

Following is a summary of findings:

- Instead of full-time leisure, today's boomers seek more work options, such as reduced hours or days per week; more time off over the year; special project or contract work; greater flexibility; part-time work; and even the opportunity to start new careers, including unpaid community service. Most of these scenarios imply the need for training and learning. Currently, 50 percent of all workers ages 55 to 65 have some sort of bridge job before taking full retirement. A shift to a different job or occupations often creates the need for retraining.
- Computer, information and automation technologies are increasingly being used in work settings. Technology-based occupations are expected to grow significantly in the upcoming decades. Although the use of computers and the Internet among older adults is increasing, there is still an age-based digital divide.
- Most workers ages 55 to 64 are in executive/management and professional occupations, whereas workers 65 to 74 are more likely to be employed in farming, fishing, forestry, sales, and transportation and service jobs. In the future, the percentage of older workers will increase in all occupational categories, but the greatest increase will occur in white-collar occupations such as executives, managers, professions (e.g., teachers, health care professionals), administrative support and sales. Almost two-thirds of the projected job openings in the next 10 years will require specialized education and on-the-job training.
- Older adults are receptive to and able to learn new skills, even ones involving new technology. However, they are typically slower to acquire those skills than younger adults. This may be attributable to older adults' preference for accuracy over speed, with the reverse holding true for younger adults.
- Aging as a process results in changes that could affect learning, such as declines in vision, hearing, motor skills and changes in memory, attention and processing speed. Thus, learning a new skill may be more challenging for older people and they may take longer than younger adults to acquire new skills (1.5 to 2 times the amount of time).
- Research shows that for activities that require new learning and problem solving (i.e., fluid intelligence), peak performance comes in the 20s or 30s and then there is gradual decline. For activities that rely on stored knowledge (i.e.,

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- crystallized intelligence), peak performance may move toward the 40s and 50s and then show modest decline, with increases in the rate of decline in the 80s.
- Factors influencing learning and skill acquisition include: person-related factors (i.e., person's knowledge base, perceptual and psychomotor abilities); social factors (i.e., pair-based learning is equally effective as individual learning, modeling is effective in promoting learning in older adults); and environmental factors (i.e., older adults have greater difficulty ignoring irrelevant information than do younger adults). There are also factors specific to the design of the training program—pacing, amount and spacing of practice, feedback, training media and general training approach (e.g., procedural vs. conceptual training).
 - Older adults are likely to suffer the effects of stereotypes about age-related performance decline. This may result in both negative manager perceptions and negative self-perceptions about trainability. Management may fail to train older workers for fear of an inadequate return on investment, given an expected shorter horizon to retirement; however, older workers are much less likely to change jobs than are younger ones.
 - 60% of baby boomer caregivers are currently working for pay. It is important that the needs of these workers be considered when training programs are scheduled to ensure they have opportunities to participate. Online training may be particularly applicable for this group.
 - In regards to successful training methods, there is not yet an adequate research base to determine whether some training techniques are differentially beneficial for older workers on a consistent basis. There are few published reports of companies' best practices in this area (even for those companies known to be friendly to older workers). However, a meta-analysis of training techniques found:
 - There are greater gains for older adults when performing procedural (action or hands-on) activities compared with conceptual training.
 - Three methods of training—lecture, modeling and active participation (i.e., discovery learning) proved to be effective with older adults.
 - When comparing instructional factors such as materials, feedback, pacing and group size—only self-pacing and group size (smaller is better) were found to be important, with self-pacing the more powerful technique.
 - Three stages of learning include:
 1. Understanding fundamental concepts and basic performance requirements associated with the material to be learned
 2. Attaining sufficient command of the background information, facts and concepts to shape this information into "packets" or "chunks" of knowledge
 3. Modifying and fine-tuning the procedures or strategies to increase their reliability and efficiency. This stage often requires the longest practice period. It is critical to ensure that learning is not just for immediate mastery but transfers to behavior in real-world settings.
 - Some specific tips for training older adults include: Distractions such as background noise, other worker activities and too many instructors should be minimized and the use of multimedia should be restricted; keep demands on working memory to a minimum, and where possible, capitalize on the learner's pre-existing knowledge base; if the task is complex, training demands can be reduced by using part-task training techniques such as providing practice on task components and proceeding from simple to more complex aspects of the task.

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- In addition to design factors, it is also important to develop strategies to encourage older workers to participate in training and retraining programs. Research suggests that people are more receptive to engaging in learning activities if they perceive them as having some long-term benefit. Consideration also needs to be given to the scheduling and location of training programs and the potential for industry/community partnerships.
- Areas that are in need of future research:
 - Capture the complexity of job tasks and the contextual elements of the work environment. Need to include a wider age range of workers in order to assess potential interactions between the type of training and the age of the worker.
 - Examine strategies to influence the antecedent conditions that control the older worker's desire to train or retrain. Particularly the relationship of attitudes about training and training outcomes.
 - What proportion of training is informal versus formal? How does the mix of training types vary with age? These questions are relatively poorly addressed in the literature and deserve greater attention.
 - Tele-work is becoming increasingly available; however, little is known about the advantages and disadvantages of this form of work for older adults.
 - Careful consideration needs to be given to how "training success" is defined. Move beyond defining success purely on the basis of statistical significance on measures, such as knowledge tests, to measures that have practical significance, such as changes in the way that work activities are carried out.

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Wilson, L.B., Steele, J., Simson, S.P., & Harlow-Rosentraub, K. (2006). Legacy leadership institutes: Combining lifelong learning with civic engagement. In L.B. Wilson & S.P. Simson (Eds.), *Civic engagement and the baby boomer generation: Research, policy, and practice perspectives* (pp. 111-141). New York: Haworth Press.

Currently, 50+ volunteers expect and demand more from their volunteer experience. They expect to be part of the decision-making process. They want flexibility that allows them to integrate paid and unpaid work. They seek engagement in meaningful opportunities similar to those offered to paid staff. They are motivated to transfer their professional skills to impact local community needs.

The university-based, lifelong learning and civic engagement Legacy Leadership Institute Model (LLIM) combines all of these elements in a single, flexible and replicable model. Initially developed in 1998, the LLIM has been adapted and implemented in multiple global settings since that time. It was strategically designed to respond to the known needs and desires of the baby boomer generation and younger retirees. The institute's mission is to prepare older persons to serve as multigenerational ambassadors who are committed to preserving the wisdom of the past, applying knowledge to community need in the present and transferring these gifts to future generations. The LLIM serves to customize and deepen the individual level of community involvement in service activities through six broad goals:

1. Integration and utilization of the expertise of institutions of higher learning to create a visible, centralized base for the recruitment, training and retention of volunteers aged 50+
2. Expansion of community capacity to meet unmet needs by creating a corps of well-trained 50+ volunteers who engage in community service through a university-based portal and who are committed to applying their time and talent to unmet needs
3. Provision of greater flexibility and more service learning options for community involvement for volunteers that better match baby boomer expectations.
4. Development of a replicable, university-based infrastructure to attract, train and coordinate a continuous stream of volunteers to fill a wide variety of community service needs
5. Preparation and training for community-based organizations on designing and developing new approaches to working with baby boomer volunteers
6. Development of evaluation standards and tools to measure the impact on volunteers and community organizations alike that would lead to national, state and corporate policy changes.

Legacy Leadership students can customize their learning objectives and connect to active and sustained community service for personal and community impact. The LLIM is operationalized through the following six core components:

1. Program development and community partnerships—The LLIM draws from and integrates the values, needs and objectives of the local community. Each LLI focuses on a different segment of the nonprofit sector (e.g., health, literacy, environment) or on an unmet infrastructure need in the nonprofit organization (e.g., volunteer management, fundraising, information systems/technology).
2. Recruitment and screening—The intent of the LLI is to attract a diverse group of participants and to create a marketing niche with broad appeal to the 50+ population. The word "volunteer" is intentionally omitted from all materials in response to feedback that it implies "low-skill" activities. This approach has resulted in consistently attracting highly skilled, soon-to-be or recently retired participants, a trend not seen in more traditional volunteer recruitment efforts. Each LLI accepts a maximum of 30 participants with one to three classes per

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- year. The application process is designed to be competitive and mirrors that of applying for a professional, paid position. Accepted applicants must make a commitment to complete a minimum of 250-400 hours of combined lifelong learning and community service within a one-year period. Volunteer leaders usually work 8-10 hours per week with liberal allowance for vacations, caregiving, grandchildren and other pursuits.
3. Curriculum design and development—The LLIM engages students in 45-65 hours of classroom learning, followed by an unpaid, supervised field placement in a community-based organization. The intent of the curriculum is to be academically challenging, provide meaningful life-application skills and create a forum for significant interaction that focuses on problem solving, knowledge of community resources and self-development skills. All leadership students must complete the core curriculum.
 4. Volunteer leadership field placement—Providing volunteers with meaningful, supervised field placements is key to retention and high quality service. It elevates, adds value and professionalizes the volunteer experience. Students are placed in teams of three to four at a particular site to reinforce the service-learning experience, create an esprit de corps and leverage their collective expertise for high-impact service. Each prospective placement site is screened by university staff to ensure sound internal operating practices and program policies that value and integrate volunteers. Approved sites must designate a direct supervisor.
 5. Graduation—A graduation ceremony serves as the culmination point for the Legacy Leadership program. Graduates are then inducted into the LLI Alumni Association, which fosters continued, purposeful social networking, information sharing, informal support systems and continuous lifelong learning training sessions.
 6. Research and evaluation—In developing new approaches to the recruitment, training and retention of the next generation of volunteers, it is essential to assess the impact of the model on the leaders' nonprofit agencies and communities. All participants in the various iterations of the LLI concept are asked to participate in baseline and follow-up data collection.

The lifelong learning and civic engagement model described here has broad organizational and community application. The strength of the model is its flexibility and adaptability to specialized community need and a variety of sectors with the nonprofit community. This model offers organizations the opportunity to reframe their message, rethink their programs and services, and create a marketing niche through a partnership with both universities and potential volunteers.

Employment and Retirement

New Face of Work Survey. (2005). MetLife Foundation/Civic Ventures.

The purpose of this study was to examine whether those age 50 to 70 were open to and interested in giving back to their communities in the next phase of their lives. This survey was conducted in 2005 and included 1,000 people age 50 to 70. Some of the findings from the report were:

- Currently, 50% are working (35% work full time), 32% are retired and not working, 4% are unemployed but looking for work, and 6% are disabled.
- 62% have been in their current job for at least 10 years (36% have been in the same job for 20 years); 23% have been in their current job less than five years.
- 50% say they are interested in taking jobs now or in the future to help improve the quality of life in their communities.
- 58% are interested in taking a paying job in one of seven types of organizations or programs that serve their communities (education, health care, helping those in need, working with youth, civic activism, arts and culture, and the environment).
- 49% agree that it is important that in retirement helps the community in specific ways.
- 39% say they think it would be easy to find such a job; 48% say it would be difficult.
- Why continue working? Four aspects of work were very important to those considering working in retirement: 59% say staying involved with other people, 57% say the job gives them a sense of purpose, 52% say the job provides additional income, and 48% say the job provides the opportunity to help improve the quality of life in their community.
- Gender differences—70% of female boomers say it is very important that a job in retirement “gives you a sense of purpose,” compared with 48% of male boomers. And more women than men (50% vs. 28%) say the opportunity to help people in need is a very important characteristic attracting them to a job in retirement.
- Attractive job characteristics. Boomers would be likely to work for the following reasons: 82% say if they could collect pension and social security without penalty; 85% say if they had the option to work part time; 83% say for a flexible work schedule; 74% for health care benefits; 71% for a tax break for a particular job; and 62% for training to provide new skills.
- Obstacles to working in retirement. Things cited as “major reasons”: declining health (53%), work not fulfilling (35%), family obligations (32%), inflexible hours (31%), can’t find the right kind of work (22%) and inadequate pay (19%).
- The vast majority strongly support changes to remove obstacles that hamper work in retirement: 60% strongly support giving a tax credit to older Americans who work in schools/social services; 48% strongly support increasing funding for those who go back to school or who get training to prepare for work in schools/social services; and 46% strongly support a grant or tax credit for those over age 50 who spend a year in training or actually working in a job in public or community service.

This research suggests 10 critical trends:

1. Most baby boomers say they will continue to work during what used to be the retirement years.
2. Baby boomers desire to do work that enhances the well-being of others.
3. Baby boomers want to work in areas that have human resource gaps such as education, health care and social services.

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4. Baby boomers want to do work that is not only personally meaningful but that means something important to the wider community.
5. Although many baby boomers work in the retail sector, many want to focus their time, talent and experience on work that directly contributes to social renewal.
6. Given that they want to shift toward good work now, not when they are 65, they'll have 10 or even 20 years to put into this second career. That makes the prospect of additional education and retraining more appealing.
7. While those surveyed showed strong interest in getting a better balance between work and life, the desire to work suggests people believe some of their most important contributions may well lie ahead.
8. Additional income and a sense of idealism are important components of the drive toward good work, but even more important are people and purpose—the connections to others committed to similar goals and a reason to get up in the morning.
9. Despite strong interest in pursuing new work for the greater good, few thought it would be very easy to find this type of engagement. This suggests a few barriers: We do a much better job helping people plan financially for the second half of life than helping them navigate their way from one phase of life and engagement to another; and, there is little receptivity by the nonprofit sector in tapping this coming population of aging boomers.
10. The drive toward good work comes largely from the people themselves—not the organizations that might use their time, talents and experience.

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The business case for workers age 50+: Planning for tomorrow's talent needs in today's competitive environment. (2005). A report for AARP prepared by Towers Perrin.

The purpose of this study was to provide a thorough examination of the recruitment and retention of workers age 50+ within a business-case framework. This study discusses ways to develop and implement an effective strategy for retaining and recruiting workers 50+. This study includes an extensive review of the available research on this issue and an in-depth telephone interview with senior human resource executives in 10 major organizations across the U.S. This study discusses three important trends that will have a dramatic impact on the American workforce: 1) the workforce and the population as a whole are aging, 2) labor shortages are projected in a growing number of sectors of the economy and 3) many workers intend to continue to work beyond the traditional retirement age. Attracting and retaining mature, experienced workers will become increasingly critical to maintaining a competitive advantage in the new labor market.

Key findings of this study include:

- As baby boomers approach the traditional retirement age, many U.S. companies face a potentially significant loss of experienced talent in key roles.
- Some companies may be able to escape the talent crunch entirely if today's 50+ workers do, in fact, stay in the workforce longer than previous generations. However, some companies are already feeling the talent pinch in some positions.
- Many U.S. workers today expect and want to continue working past traditional retirement age, for both financial and personal reasons. For employers, workers 50+ represent a potentially attractive solution to near- and long-term staffing challenges if they are successful at retaining and attracting this growing pool of talent.
- Research shows that 50+ workers bring experience, dedication, focus, stability and enhanced knowledge to their work. Half the respondents to a recent survey by the Society for Human Resource Management said they are seeing many new workers who lack overall professionalism, written communication skills, analytical skills and business knowledge.
- Older workers are more motivated to exceed expectations on the job than their younger counterparts are. Companies with more highly engaged employees outperform their industry peers on a range of key business and financial measures.
- The benefits of a stable workforce and avoiding turnover cost can exceed the incremental compensation and benefit cost for a 50+ worker.
- To retain, attract and engage workers 50+, organizations will need to offer the right mix of rewards, including health care benefits, innovative growth and development opportunities, competitive retirement benefits and, perhaps most important, flexible work and part-time employment opportunities. Companies will also need to pay closer attention to the work environment and cultural factors that contribute to a positive working experience for a multigenerational workforce.
- A small but growing number of companies have begun to focus on the 50+ workforce; however, relatively few companies thus far have fully positioned themselves for the coming workforce demographic shifts.

What are the leading companies doing to address these issues? A growing number of companies are implementing targeted strategies and programs to recruit and retain 50+ workers. There is also growing employer interest in phased retirement programs designed to enable employees to withdraw from the workforce gradually. Currently, pension rules and other legal concerns pose a barrier to formal programs of this sort.

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Following are some key steps that are critical in any company's efforts toward recruiting and retaining 50+ workers:

1. Inventory your current talent and define future needs, based on an analysis of your organization's near- and long-term business plans.
2. Model your cost trends to understand the business case for investments needed to attract or retain 50+ workers, focusing on total compensation costs for the various talent pools and taking into account one-time turnover costs.
3. Pay equal attention to revenue and performance considerations, including the impact of employee engagement on company performance and turnover risk.
4. Study the available labor pool and define your talent strategies, keeping in mind the specific requirements (physical, mental and scheduling flexibility) of each job.
5. Align reward programs to support your business and talent objectives.
6. Align workplace policies and culture, since all of the available research points to the work environment as a key consideration for 50+ workers in deciding whether to join or stay with an organization.

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Breaking the silver ceiling: A new generation of older Americans redefining the new rules of the workplace. (September 20, 2004). Congressional Testimony before the Senate Special Committee on Aging, by Douglas Holbrook, Member of AARP Board of Directors.

The large majority of boomers say they expect to work in retirement. AARP's recent research on 1,200 boomers' expectations for retirement found that 80 percent plan to work in some capacity during their retirement years. Over half expect to work part time, and 15 percent plan to start their own business.

Numerous economic factors will impact whether workers remain in the labor force later in life:

- Inadequate retirement savings
- Stagnating pension coverage that leaves many workers with little or no pension protection. Only about half of private industry employees participate in an employer-provided pension plan.
- Cuts in retiree health benefits, making early retirement financially unfeasible
- The increase in the age of eligibility for full Social Security benefits and reduction in the size of the age 62 benefit.

Other factors may encourage workers to postpone retirement:

- Higher education levels. Better-educated workers are more likely to be in the labor force than less-educated peers.
- Increased life expectancy
- Improved health status
- Changes in the physical demands of many jobs
- Labor shortages that may prompt employers to implement programs and policies to attract and retain older workers

Highlights of AARP's *Staying Ahead of the Curve* 2003 study, which surveyed 2,001 employed men and women between the ages of 50 and 70:

- Reasons cited for continuing to work: the desire to stay active, to be productive, to help or be around people, finances (the need for money and for health benefits).
- More than half of employed women age 55 or older work in the service sector, compared with less than one-third of men. Older men are more likely to be in manufacturing, construction, transportation, communication and public utilities.
- One-third of older workers are in professional jobs, where experience and institutional knowledge are valuable attributes. Women are four to five times more likely than men to have administrative support jobs.
- Older workers express considerable interest in flexible schedules, part-time work and non-traditional arrangements. More than 80 percent who plan to work in retirement expect it to be part time or part of the year.

AARP awards employers whose practices and policies address the needs of an aging workforce. It takes into account an employer's recruiting practices; opportunities for training, education and career development; workplace accommodations; alternative work options such as flexible scheduling; health and pension benefits; and the age of the workforce. The challenge for employers is to make work attractive. Those who implement programs and policies to attract and retain older workers will find themselves well-poised to convert a potential resource into an actual one and reap the benefits of their foresight. A list of employers is found on the AARP website (www.aarp.org/money/careers/findingajob/info.html).

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Out and aging: The MetLife study of lesbian and gay baby boomers. (2006). MetLife Mature Market Institute, Lesbian and Gay Aging Issues Network of the American Society on Aging, and Zogby International.

This study represents the first national survey of lesbian, gay, bisexual and transgender (LGBT) baby boomers and their concerns regarding caregiving, social support networks, retirement and end-of-life planning. A sample of 1,000 LGBT people age 40 to 61 participated in an online survey. The following are highlights from the report and related implications of the findings.

Caregiving and Social Support Networks:

- 25% of respondents said they had provided care for an adult friend or family member within the last six months. This suggests that appropriate workplace policies and programs may be needed to help older LGBT employees remain productive while balancing work responsibilities and eldercare demands.
- Gay and bisexual men are providing care much more frequently than men in the overall U.S. population.
- Of those who are caregivers, 36% are caring for parents, 18% are caring for their partners, 14% are caring for friends and 12% are caring for other nonrelatives.
- Almost 20% reported being unsure who will take care of them when the need arises. This was especially the case for those without partners or spouses, of whom more than one-third said they were unsure who would provide them with needed care.
- More than 75% of respondents have important connections with what researchers have called families of choice—close friends who are “like family.” Providers should be alert to the importance of nonrelatives as a source of support and informal care for LGBT people in midlife and older.

Concerns about Aging and Retirement:

- The greatest concern for LGBT women is outliving their income as they age.
- The greatest concern for LGBT men is becoming dependent upon others and becoming sick or disabled.
- 27% of LGBT boomers reported great concern about discrimination as they age. Less than half expressed strong confidence that health care professionals will treat them “with dignity and respect.”
- 47% said they would like their end-of-life care to take place in their current residence with the help of hospice care. 16% would like to spend their final days in their own home without hospice care. Hospice and homecare agencies would do well to assess their cultural competence regarding the concerns of LGBT elders and to provide training in this area to their frontline staff.
- Lesbian and bisexual women appear to be less financially prepared for the end of life. They are less likely than their male counterparts to have purchased long-term care insurance or to have written wills. LGBT organizations, business providers, financial institutions and organizations that work with older adults could play a vital role in educating LGBT boomers about long-term care planning needs and options.
- 51% have yet to complete wills or living wills—documents that are particularly important for LGBT older adults given the current lack of legal protection for LGBT couples and families. Organizations may need to look at developing targeted programs to assist LGBT boomers in preparing such documents.
- 40% of respondents believe that being LGBT has helped them prepare for aging in some way. They have developed positive character traits, greater resilience or better support networks as a consequence of being LGBT.

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Good practice in the recruitment and retention of older workers: Summary. (2001).
Department for Work and Pensions, United Kingdom.

This guide was developed to provide positive examples of the benefits of recruiting and retaining older workers (defined as those age 50 and older). It was prepared after consultation with employers and older workers in 26 companies throughout England, Wales and Scotland. Small, medium and large organizations are represented.

Benefits of recruiting and retaining older workers:

- High retention rates. This reduces recruitment costs, and their knowledge, skills and experience are retained by the organization, factors that contribute to profitability.
- Lower absenteeism. Older workers are likely to have few periods of short-term absence.
- Reliability, commitment and dedication. Allows employers to run their business efficiently and effectively.
- Flexibility and innovation. Older workers work constructively as part of a team and they apply their experience to new situations.
- People-oriented skills. This attribute is especially beneficial to businesses with high levels of customer contact. Older workers often show a degree of calm authority when difficult circumstances arise.
- People development skills. Employers recognized that older workers make a positive contribution to the development of younger staff members.
- Ability to deal with change. The fact that older workers have dealt with periods of change in the past enables them to deal with change in the workplace with equanimity.
- Leadership. The combination of their knowledge, experience, work ethic and life skills can be inspirational to others.
- Generic knowledge of other industries. Older workers are likely to have worked in other sectors of industry. This knowledge can be drawn on to the benefit of their own business.

Good practices are about developing policies and actions that give older workers equal access to job opportunities and, if successful, support them in their employment. Good practice has three principal dimensions.

1. Developing formal policies to address age discrimination
 - Formal policies demonstrate the commitment of management and should be communicated to all staff and monitored.
2. Creating an organizational culture that values older workers and recognizes the benefits of their employment
 - Develop formal policy statements against age-related discrimination
 - Take action to ensure that older workers are not discriminated against
 - Raise awareness of policy on age discrimination and the benefits of employing older workers
 - Maintain regular contact with older workers
 - Integrate older workers in the workplace
 - Monitor and review policy and actions
3. Introducing actions that support older workers. Actions can be small, often with minimal cost implications. Some examples:
 - Try different approaches to training. Allow older workers to learn at their own speed. Redesign training courses to meet the needs of older workers.

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- Allow older workers to mentor or supervise younger workers
- Incorporate flexible work practices (i.e., hours, shifts, adjusting the length of the work week)
- Ergonomic adjustments may be needed, such as adjusting the kinds of tasks undertaken, modifying the workplace design and adjustments to combat physical decline.

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Lancaster, L.C., & Stillman, D. (2002). *When generations collide: Who they are. Why they clash. How to solve the generational puzzle at work.* Harper Collins Publishers, Inc.

Different generations define "retirement" differently. As the generations are making plans for what to do when employment ends, each is writing a new definition as to what it means to "retire."

Traditionalists view retirement as "reward." They have worked hard, planned and saved, and deferred gratification to a later time when their kids are launched and their debts are paid. They see retirement as a well-earned reward after a lifetime of service to company, country and family. Because traditionalists are likely to live longer than their parents, they are concerned about outliving their savings. Seventy-two percent of them said they planned to continue working in some capacity after formal retirement.

Baby boomers view retirement as "retooling." They tend to view retirement not as a well-earned rest but with ambivalence, even discomfort. This is a generation that refuses to believe they are getting older; they are active and healthy. They want to retain their youth, but even more important, they want to retain their influence. They want to be able to earn and achieve at any age and at any life stage. They will continue after "formal" retirement to accept a series of alternative careers that will continue to provide self-definition. Employers need to find ways to provide new challenges and new learning to boomers who might be bored or burned out. Their considerable level of education and work experience will make many of them sought-after leaders, consultants and mentors. As boomers move through their 40s and 50s, they will test the feasibility of being free agents by taking small freelance assignments or telecommuting a few hours a week. A 1998 survey found that the median age at which boomers expect to retire from their primary career is 61; 66% said they will continue to work afterward. Most said they plan to work part time, and 36% intend to run a home-based business. The retirement income of boomers may be supplemented by inheritance. The wealth of traditionalists has been estimated at some \$10 trillion to \$12 trillion, so it is likely that boomers and their offspring could find themselves relatively well provided for. Boomers who held off childbearing could be paying for college until well into their 60s. When asked whether they knew how much money they would need at retirement, 40% of boomers answered "no." Financial consultants report that boomers tend to grossly underestimate how much money they will need in retirement. Boomers are also buying larger homes, even if most rooms go unused much of the time. They want to create a place where family can gather and a "place to come home to." When asked what their company's role should be in helping them prepare for retirement, almost 70% of boomers said it should be "financial, plus planning and education."

Generation Xers view retirement as "renewing." This generation is saving money at a younger age and faster pace than boomers ever did. Xers focus on retirement as a chance to renew. They aren't planning to wait around to age 65 or even 45 to do the rewarding, retooling or renewing. They want to enjoy the things that are important to them *throughout* their career, not at the end of it. They will take time out during their careers to travel, try a new interest or vocation, or spend time with family. A lot of Xers plot their careers around large chunks of time off that enable them to do things they've always wanted to do. Their desire and attitude to renew themselves is not going to diminish with age but will only become all the more critical when additional responsibilities load on. Regardless of how the economic pendulum swings, Xers will always find jobs. Freedom-loving Xers resent the idea of being "trapped" by a job, and they fear the burnout they saw their parents suffer. More companies should

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explore sabbatical programs as a way to help Xers renew. Xers will most likely come back to their job more committed. Organizations must consider the *renewal factor* in understanding how to keep Xers motivated and turned on. The bottom line is that the attitude that the "great reward" happens at the end of a long career will *never* make sense to this generation.

Millenials will most likely retire the word "retirement." As millenials demand to be involved in work that has meaning, and expect to have fun along the way, they may never fully understand why a person would need to reward, retool or even renew in the first place. As they will see it, those are things you do every day of your lives. This may very well be the generation to erase the word retirement from the English language.

The better job companies do of understanding what makes the generations tick when it comes to retirement, the better job they can do of managing and retaining them.

Community Service

Center for Health Communication, Harvard School of Public Health. (2004).
Reinventing aging: Baby boomers and civic engagement. Boston, MA: Harvard School of Public Health.

Approximately 77 million babies were born in the U.S. during the boom years of 1946 and 1964. In 2011, the oldest will turn 65, and on average, can expect to live to 83. Many will continue well into their 90s. Boomers have the potential to become a social resource of unprecedented proportions by actively participating in the life of their communities. However, boomers have done less in the area of civic engagement (compared with their parents' generation), including rates of voting and joining community groups. Half of the boomers surveyed did not envision civic engagement in their retirement years.

Volunteering is a reflection of an underlying quality of social connectedness that may manifest itself in many ways: through work or social life, formal community service or informal helping, secular civic engagement or faith-based good works. The critical question, then, in relation to aging boomers is the extent to which they will embrace or enhance this quality of social connectedness, which can be played out through a variety of mechanisms, both formal and informal, structured and unstructured, organized and unorganized.

Some observations from the report in relation to volunteering, work and retirement:

- The percentage of people who volunteer reaches a peak during midlife and gradually declines with age.
- The biggest single inducement to volunteer is being asked by someone one knows; thus, volunteering tends to be an extension of one's family, work and social life rather than something apart from it.
- The demands of caregiving as well as personal health problems are reasons older people often give for not being able to volunteer more or for cutting back on existing activities.
- With more women working and remaining in the workforce longer, the pool of female volunteers may be reduced. However, their ongoing connections to larger social networks and institutions may be greater than those of their predecessors. Nevertheless, women's ability to continue contributing to the life of the community as they age will depend on their having the financial and social supports that will allow them to do so.
- Large-scale efforts (i.e., media campaigns) may be needed to recruit boomers as volunteers.
- An organized effort (i.e., community-wide service initiatives) could help boomers envision and plan for a life that achieves meaning in their later years by connecting in new ways to their community.
- The current language of aging is obsolete and may be an impediment to change. New language, imagery and stories are needed that simultaneously reflect the changing cultural realities of the 21st century, evoke a new sense of what is possible, and engage both boomers and the general public in re-envisioning the role of elders and the meaning and purpose of one's later years. The first word that needs to be reconsidered is the term "volunteer."
- Organizations may need retooling (i.e., changes in infrastructure and policies) to attract and retain boomer volunteers.
- A wide range of volunteer opportunities will be needed (i.e., offer a broad set of options that allow people to engage in different ways at different times and

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at different levels of commitment. These options should range from one-time or episodic opportunities.). It is important that boomers perceive opportunities for service as being convenient and tailored to their individual interests.

- Intergenerational programs deserve special attention. Young people in such programs show measurable improvements in school attendance, attitudes toward school and the future, and attitudes toward elders. Adult volunteers report substantial benefits to themselves.
- Communities should develop plans to involve boomer volunteers in tackling important local problems. They should offer volunteers a range of opportunities for involvement, ranging from episodic to regular and from casual to intensive.
- Informal volunteering and “helping” should be valued and encouraged.
- The participation of men and women in the workforce has increased since the mid-1980s and the average age of retirement has increased.
- Between one-third and one-half of people who leave their full-time careers move into “bridge jobs”—that is, full- or part-time jobs other than those in which they spent the better part of their working years and that presumably “bridge” the transition from work to retirement.
- As many as half of current retirees left the workforce earlier than they planned to or wanted to, most often because of poor health or adverse economic events.
- What motivates people to continue working or retire varies. Some work even when they could afford to retire because they derive satisfaction from their work; others work because they cannot afford not to. Those with less satisfying work choose retirement (or early retirement) as soon as they can afford to do so.
- When respondents were asked what they think they will be doing in retirement, researchers put them into five groups:
 1. The Strugglers (9%)—Few financial resources and very pessimistic about their future. Primarily female, not married, low education and income levels, and less likely to be employed.
 2. The Anxious (23%)—Some retirement savings but not enough to instill confidence in their future. They expect they will have to struggle to make ends meet or they have serious worries about their health. More likely to be female, not employed full time, with lower education and income.
 3. Today’s Traditionalists (25%)—Middle income with moderate retirement savings. Tend to expect more intergenerational family support. Expect to work in retirement for a variety of reasons. More ethnically diverse than other segments (more African-Americans and Hispanics).
 4. The Self-Reliants (30%)—Affluent, educated and healthy; pride themselves in their independence. Have significant retirement savings. Differ from Enthusiasts in their anticipation of being more connected to the community through employment or community service. More likely to be married, well-educated, have a higher income and reported health status.
 5. The Enthusiasts (13%)—looking forward enthusiastically to their retirement. They are well-off financially and look forward to their impending leisure (enjoy hobbies, travel, relax). Do not plan to work. More likely to be male and married, but income and education levels are similar to boomers as a whole.

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- The Strugglers, Anxious and Enthusiasts (45% of boomers) seem unlikely to yield substantial numbers of volunteers; whereas, the two groups in the middle (Traditionalists and Self-Reliants) expect to remain involved in the community. Boomers' ability to contribute to the community will depend in large part on their health and financial status and the family and social supports available to them.

A range of opportunities are needed to allow people to engage in different ways in different times and at different levels of commitment. Many sectors of society can play important roles in this process:

- **Policymakers** can re-examine whether current public policies are aligned to support and encourage the participation of retirees in civic life.
- **National nonprofit organizations** can take the lead in helping local affiliates identify and develop volunteer opportunities to obtain services they otherwise would not be able to afford.
- **Local nonprofit institutions** can expand their vision of how retired boomers can help them enhance their services and create flexible opportunities that will meet the needs of both boomers and the organization.
- **Employers** can make volunteer opportunities known to employees to enable them to try out public service roles while they are still working.
- **Local governments** can identify opportunities and provide support across their range of functions—health, education, recreation and social welfare. Volunteer service should augment and not substitute the jobs of public employees.
- **Faith-based institutions** can foster the social networks that encourage members to connect not only to each other, but to the larger community as well.
- **Special interest clubs** (i.e., chess, cooking or gardening) can expand their horizons through structured programs that reach out to the community—for example, by sharing their interests with young people through intergenerational programs.
- **Educational institutions**, as they begin to revamp their curricula to meet the needs of older adults as well as youth, can develop intergenerational learning and service opportunities.
- **Hollywood** can create new images of aging, new stories that can help people envision alternative futures for themselves and that can help the rest of society see seniors in different productive roles, such as volunteering.
- **News organizations** can spotlight the stories of first-wave and pre-boomers who are creating new paths in retirement that include volunteering.
- **Public and private funders** can support efforts to train and supervise boomers who step forward in retirement to volunteer.

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RespectAbility in America: Promising practices in civic engagement among adults 55+. (2006). Washington, D.C.: National Council on Aging.

The goal of this report was to learn “what is working” and “how it is working” from the local organizations and community-wide initiatives experiencing demonstrable success in engaging adults (age 55+) in service to their communities. 105 organizations applied for the Promising Practices national award; 34 semifinalists participated in structured telephone interviews; and seven programs were selected as award winners.

Award winners were selected on their ability to document evidence of success in one or more of the following five key outcomes:

1. *Increased participation:* through successful methods to increase the recruitment, support, commitment and the diversity of adults 55+ in service to their organization.
2. *Meaningful new roles:* drawing on existing skills, interests and professional expertise, or on the desire and capacity to learn new skills and roles.
3. *Improved quality of life for adults in service to their communities:* such as achieving better health, more social connections or an outlet for their desire to give back to the community.
4. *Enhanced organizational capacity:* to achieve their mission and meet their goals through successful methods of engaging and utilizing adults 55+.
5. *Enhanced community impact:* demonstrated a greater impact from the service contributions of adults 55+ to their clients, partners and/or the community at large.

Following are specific practices and actions for engaging adults 55+ in service to their communities as they relate to each of the five outcomes.

Increasing Participation

- Raise general community awareness to build public and partner support
 - Engage the community in open dialogue; seek out and convene community members; bring the issues concerning your target audience to the table to build understanding and brainstorm possible solutions; regularly and consistently share information about your program.
- Develop communication methods and messages that attract adults 55+
 - Establish a media advisory committee; issue a call-to-action through a variety of communication vehicles; convey the mission and organizational image via appropriate terminology and program naming; communicate a consistent message; develop a high impact mission statement; appeal to core values when presenting opportunities for adults 55+; communicate the excitement of participation; describe the possibility of a chance to have a new job/career.
- Employ proven recruitment strategies to attract older adults
 - Train participants to be program ambassadors, advocates and organizers, and offer incentives for fulfilling these roles; encourage engaged professionals to actively recruit peer to peer; provide a menu of program introductions for potential participants; create opportunities for those not involved to observe the dynamics of engaged activities; simply asking is a tried-and-true approach to recruitment; become a resource for pre-retirement planning sessions in local community businesses; host a mature workers job fair in partnership with a local staffing agency to showcase your program; hold routine information sessions at faith-based organizations; invite volunteer managers from

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- community groups to a monthly meeting to learn recruitment strategies and share successful practices.
- Customize recruitment strategies for special target groups
 - Three key groups are receiving the most attention in today's most promising civic engagement organizations: 1) baby boomers, 2) participants with professional training and expertise, and 3) growing ethnically and culturally diverse populations.
 - Strategies for engaging boomers: allow for alternative service methods for those with limited mobility or those who travel part of the year; provide an array of opportunities for short-term, episodic service engagements, especially on weekends and evenings; provide opportunities for participants to connect with like-minded peers to help fulfill their desire for socialization (i.e., sponsor a "boomers night out").
 - Strategies for engaging professionals: create a work environment that appeals to highly skilled and experienced adults; provide resources and support tools the professionals are accustomed to; remove serious barriers to continuing medical practice in retirement.
 - Strategies for engaging participants from diverse populations: bring together a board of people from different agencies that are working with the targeted community or population; ensure that the populations are fairly represented on the organizing and governing bodies of the organization; adapt or develop new approaches for cultures that do not respond to the concept of volunteerism; develop a tiered approach to recruitment using cultural representatives who can influence others to participate; communicate in culturally appropriate ways that demonstrate respect for other languages and cultures; initiate activities to engage immigrants with limited English-speaking ability; match adults 55+ with their cultural and linguistic peers to create a sense of community.
 - Foster commitment to ongoing participation in civic engagement
 - Create a competitive application and interview process as a prerequisite for participation; empower participants to create community change by giving them the necessary tools; expect a long-term commitment of volunteers to ensure the engagement of serious candidates; allow participants to enter a program at several different junctures and pursue goals they wish to achieve; allow engaged adults to choose the level of their commitment, depending on their interest and availability; develop and promote a new model of retirement that combines all types of activities (i.e., education, recreation, family, work, volunteerism); allow volunteers to have some control over their placement.
 - Address differing motivations and provide incentives for engagement
 - Motivate potential participants by personalizing the outcomes; recognize the need of some adults to seek additional income and provide opportunities and links for paid work; call on and prepare retired workers to fill gaps in service in areas needing more skilled workers; thoughtfully designed incentives that are valued by adults 55+ can offer short-term motivators that ensure day-to-day involvement.

Meaningful New Roles

- Design programs with attention to participant assets
 - Administer an Asset Survey to potential participants to catalog their interests, talents, passions and life experiences; create a skills inventory checklist to match adults to service activities; tailor service opportunities to members' particular training and experience and use this information to develop professionally challenging assignments.

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- Systematically plan the organization's approach to new role development
 - Enlist host organizations in developing new roles and training for adults 55+ to take on capacity building roles; plan and manage how volunteers are introduced and supported in host organizations to ensure successful placement; develop specialized professional roles to tap the expertise from fields such as nursing, social work, ministry, counseling and business; use an RFP process to add prestige and a sense of importance and uniqueness to help organizations clarify the types of assistance they need to advance; work with educational partners to design courses based on specific learning needs.
- Engage and train key leaders for new civic engagement roles
 - Offer opportunities for professionals to contribute at the leadership level; use volunteers to chair all program committees; create new leadership roles or fill existing roles as volunteers gain experience; offer participants leadership training that purposely prepares them to assume new leadership roles; develop a more standardized approach to leadership training by creating a Leadership Institute within the program; formalize the process for those who want to assume leadership roles; involve volunteers in leadership roles to assist with recruitment, training, program development, marketing and fundraising.
- Provide training to prepare older adults for new roles
 - Offer courses in a formal learning environment that comprise all three components of service learning: education, service and reflection to attract more adults 55+; customize different levels of training to prepare participants for diverse roles; prepare older adults to be technically proficient with intensive training for program-specific roles; enlist community experts as trainers; develop peer-training sessions.
- Build communication and learning systems to retain participants
 - Engagement of employed adults 55+ offers an entrée to a whole new group of adults looking for ways to contribute and to ease the transition from work to retirement; create advancement opportunities and a career ladder within the organization that encourages continuing development and increased commitment to the mission; keep participants "in the know" through monthly meetings; provide specialized support for volunteers serving people in difficult assignments.

Improved Quality of Life

- Offer opportunities for meaningful involvement and ways to "give back"
 - Recognize that the successful engagement of adults 55+ in one activity often leads to increased involvement in other aspects of the organization; create opportunities for engaged adults to share their experiences with each other and communicate the importance of their involvement; those engaged in faith-based programs do so as an expression of their faith; inspire adults 55+ to share their knowledge and wisdom with others; capitalize on intergenerational interactions to motivate residents to become re-engaged in life and their communities.
- Create opportunities for personal development and lifelong learning
 - Create a menu of integrated services under one umbrella program to engage older adults in multiple activities; train participants to use their life skills and interpersonal abilities to better serve the target audience of the organization; participants will be stronger, more committed partners in the organization when given the chance to learn about the goals, activities and needs of the program; co-sponsor lectures and sessions on topics of interest to

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professionals; include social networking experiences in program training and implementation.

- Empower adults to build self-esteem and increase commitment
 - Empower grassroots community members to join the community improvement initiative; connect engaged adults with influential community leaders.
- Evaluate the impact of service on the quality of participants' lives
 - Plan an integrated evaluation process to determine program outcomes and attainment of established goals; use measurement tools based on standardized instruments to do assessments in order to produce sound and credible results; periodically administer a "quality control" survey that monitors key indicators of general program success; regularly collect data to assess key indicators that can link participant improvements to the activities and outcomes achieved in the program; use qualitative anecdotal information to help the team assess progress and satisfaction with the program until quantitative methods can be implemented.

Enhanced Organizational Capacity

- Create action plans driven by assessed community needs
 - Transform community awareness into collective action in support of capacity building; conduct a survey to assess community needs; ensure that all groups, community sectors and organizations are equitably represented; invest in expert resources to guide organizational capacity building processes.
- Build sustainable programs by tapping leadership skills of older adults
 - Design programs to become self-sustaining and member led; include a self-sustaining fundraising mechanism; empower members to take direct responsibility for the daily operations of the program; decentralize the planning, administration and management of outlying programs; encourage participants to influence the direction of the initiative, regardless of their role in the organization; empower volunteers to become first-hand experts and useful sources of information for feedback regarding issues of aging within the community; many adults 55+ bring contacts that enhance the program's outreach and increase the capacity of the initiative to fulfill its purpose; utilize participants' skills in strategic planning and managerial skills to benefit all areas of the organization; tap participants as resources for fundraising efforts and developing strong relationships with funders and donors.
- Make marketing and public relations integral to capacity building
 - Develop multiple outreach approaches to increase program capacity; engage older adults in public relations activities; build a comprehensive media strategy that communicates the core values and guiding principles of the program; encourage volunteers to become "the face" of the program when with their peers; publicize the accomplishments of the older adults to influence donors.
- Establish a neighborhood presence and involve trusted local leaders
 - Conduct multigenerational health fairs to broaden access to the underserved minority communities; recruit older adults to expand an organization's presence in an African-American community that has been historically underserved; create greater visibility in surrounding communities by showing that engagement goes beyond the walls of the organization's own sites.
- Use a team approach for peer support and accountability outcomes
 - Teams allow for shared responsibility that boosts confidence levels, strengthens bonds, provides peer support, motivates ongoing participation and prevents burnout; establish a team of volunteers that fosters camaraderie,

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- accountability and peer support; create “circles of participation” by bringing members together in groups.
- Develop partnerships that provide mutually beneficial exchanges
 - Establish a volunteer steering committee of well-connected individuals to connect your organization to key resources and people in the community; create an advisory council to promote the program; develop partnerships with key players in the community to share resources, access volunteers and increase community awareness related to strategic initiatives; partner with colleges and universities to create mutually beneficial programs; enlist the support of elected officials, city or local government departments to raise awareness of recruitment efforts and benefit from the increased visibility, credibility and shared resources; seek partnerships with faith-based institutions that share similar goals; increase the number of collaborating organizations and the number of participants each year to strengthen organizational capacity; engage consultants to guide the grassroots development process; allow members to implement creative approaches to develop new resources to strengthen the organization; have regular communications and well-executed coordination of activities between partners and among volunteers.

Enhanced Community Impact

- Foster strategic partnerships to transform attitudes toward aging
 - Include partners at the conceptual, planning or program development stage; seek partners that share a commitment to the organization’s goals and are willing to take ownership in creating a mutually beneficial partnership—their resources and assistance are integral to the program’s success; build an alliance of aging service organizations to advocate for legislative and policy reforms; build an advisory committee to draw on and share resources for marketing, staffing, and volunteer recruitment and training.
- Tap institutions of higher education for training and evaluation consultation
 - For training expertise, develop partnerships with local community colleges that provide lifelong learning as part of their mission; identify local university groups that understand the significance of and desire to support development in the field of civic engagement; house your intergenerational program in a university setting with ready access to interested faculty, staff and students, and technology; recruit and fund a university professor to evaluate your program.
- Pool resources to expand program reach and increase service capacity
 - Identify funding sources willing to jointly support a community effort; ask for needed resources from partners that have a vested interest in the target group and share the same mission; community capacity increases when community partners provide tangible and intangible resources on a continual basis or for special events and programs.
- Establish non-traditional partnerships to reach special target groups
 - Collaborate with non-traditional service providers in the community (i.e., hospitals and health groups) to more effectively reach the underserved population that have come to trust them; developing relationships with marketing and media professionals enhances capacity to get the right message out to the right audience in a professional manner; collaborate with a well-known, national organization serving older adults to increase visibility in the community.
- Build collaborative relationships using a purposeful, planned process

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- Community foundations are taking on a new role by taking the lead as community conveners of a community-wide effort to make positive changes in changing the face of aging; involve large organizations that have a vested interest in the community and its citizens and/or are the source of funding for care and services (such as the Department of Human Services) in planning the civic engagement initiative; educate organizations serving the mature market on the benefits of hiring and training older adult representatives to work with same-age clients.
- Publicize achievement of outcomes to build community support
 - Document successful outreach practices and methods to facilitate growth in new areas; older adults have the capacity to assume roles and responsibilities related to data collection and analysis; use an asset based approach to engaging older adults and building community; report progress on achieving outcomes to the community on a regular basis.

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Esmond, J. (2001). *Boomnet: Capturing the baby boomer volunteers*. Victoria Park, WA: Team Consultants.

Offering attractive volunteering opportunities to the baby boomer generation may require a shift in thinking and organizational restructuring in nonprofit organizations. The information in this report can be used to develop strategies to assist in the recruitment and support of baby boomers as volunteers. Such strategies would have the potential to impact directly on the well-being of the boomers themselves, the organizations that utilize volunteers and the community as a whole.

Organizations should concentrate on the following seven strategic focus areas in order to optimize their prospects of recruiting baby boomer volunteers:

1. Understand the aspirations and characteristics of the baby boomers
 - a. This is a time when boomers reflect on the past, question the present and re-focus, re-assess and reprioritize for the future. Volunteering offers the ideal opportunity for feeling significant and fills a need for a social and community involvement.
2. Be organized, professional and well-managed.
 - a. Boomers' standards and expectations are high; they do not have the time or patience for a disorganized volunteering experience. On the other hand, they do not respond well to too much structure or control. The overmanagement of a volunteer program can be just as detrimental as the undermanagement of a program.
3. Strive for openness and a supportive organizational environment where volunteers are truly valued
 - a. Accept, respond to and act on feedback from volunteers. Develop strategies so the organization accepts and encourages new volunteers. Offer support in the form of adequate health benefits, value volunteering efforts and treat volunteers equally to paid staff.
4. Provide meaningful, interesting, creative and challenging volunteer opportunities
 - a. Advertise a range of challenging and creative volunteering opportunities, relate the volunteer tasks to the big picture and the organization mission.
5. Identify the needs of potential volunteers
 - a. Match individuals to an opportunity that meets their needs
6. Offer education that is needed, effective, relevant and presented in an appropriate manner
 - a. Boomers are interested in education and learning opportunities that develop their own skills, benefiting themselves and the organization. Consider how the education is offered. Boomers learn best in open environments of equality between educator and volunteers, as they are often more knowledgeable than those attempting to teach them.
7. Consider the element of time (or lack of) for baby boomers
 - a. Develop strategies that provide a range of volunteering opportunities that are short term and time specific. Allow greater flexibility in their volunteering opportunities. Strategies may include family volunteering, online volunteering and employee volunteering.

Celebrating the generosity of metro Denver: Results of the 2005 giving and volunteering study. (2005). The Denver Foundation.

The Denver Foundation is Colorado's oldest and largest community foundation, with an 80-year tradition of bringing metro Denver residents together to meet the community's charitable needs. The Denver Foundation first undertook the Giving and

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Volunteering study in 2000. This report presents the results of a follow-up telephone survey administered in 2005 to 754 randomly selected metro Denver residents. Researchers also collected additional data within Denver's communities of color to better understand potential cultural differences that may exist.

Following is a summary of findings:

- 98% of metro Denver residents give either time or money, and 72% give time and money.
- All communities give generously. More than 90% of white, Latino, African-American and Asian households give to charity.
- Although families with higher incomes tend to give more dollars to charity, they give a much **smaller percentage** of their income than those with smaller annual household incomes.
- Those who consider religion to be important give 50% more than their counterparts.
- 77% of metro Denver residents give because they believe it is the right thing to do. Other reasons were because of religious beliefs (43%) and a family tradition of giving (37%).
- Donors were more likely to give to the following types of causes: human services (58%), religion (57%), natural disaster (48%), family not living with them (44%), education (43%), youth (42%), health (39%) and international (39%).
- Members of the Asian community were more likely to support arts and cultural organizations than the average donor; African-Americans were more likely to give to organizations that help victims of crime and domestic abuse.
- 74% of metro Denver residents volunteer—that is, they do some kind of work each month for no monetary pay, in service to people or causes outside of their households.
- The following groups are most likely to volunteer: people who are younger than 35 (83%), which is a shift from 2000, when the highest percentage of volunteers came from age 50-64; people with religious convictions (76%); people who gave \$1,000 or more to charity (84%); people with higher incomes (85%) or post-graduate education (83%). Residents of Boulder county volunteer at a higher rate (82%) than other metro Denver residents.
- 41% of volunteers worked to help people in need in the past 12 months. The next common forms of volunteering were building, fixing or repairing things, tutoring or helping in the classroom, and volunteering professional services for an organization.
- Latinos are more likely to volunteer their time tutoring children or helping teachers in the classroom than the average volunteer.
- People are more likely to volunteer with the following types of causes: religious group (31%), family not living with them (29%), youth group (24%), educational organization (23%), human service organization (20%), health-related organization (18%), trade association (15%) and recreational or sports team (14%).
- Metro Denver residents were broken down into five unique segments based on their charitable activities, specifically the number of causes and types of causes they support. The segments were: Skeptics, Sympathetics, Idealists, Philanthropists and Untapped Donors.
- Residents who were 55 and older were most likely to be in the Philanthropists segment. Philanthropists generally have ample resources and the desire to support a variety of different causes. They value giving back to the community and believe it is their responsibility to do so. They are well-informed and well-educated, and they get great pleasure helping those in need while looking for little personal acknowledgement in return. Financially, Philanthropists look at the

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perceived needs of the community when pledging their support, rather than allowing emotional engagement or personal connections to dictate which organizations to assist. When donating their time, they are more likely than most to be active participants in fundraising events, as coaches and youth group leaders, and many offer their professional skills free of charge. They are also heavily involved with education, family, politics and the arts. On average, they donate 31 hours per month per household (nearly twice the average). They are predominantly white (82%) and married (79%), and half are from either Boulder county or Jefferson county.

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Local Press on Boomers (Denver and Colorado)

Census report details state's older workers. (2005, February 16). *Denver Business Journal*. Retrieved November 6, 2006, from <http://www.bizjournals.com/denver/stories/2005/02/14/daily33.html>

Colorado workers, age 45 or older, represented 33 percent of the state's workforce in 2002, an increase from 24 percent in 1994, according to the "A Profile of Older Workers in Colorado" report released Wednesday. The report is part of Local Employment Dynamics (LED), a new program created through the partnership between the Colorado Department of Labor and Employment and the Census Bureau. These data allow the state to see which trends are developing within the state or in substate areas, which industries are experiencing change, and the characteristics of the workers involved in the changes. These indicators give insight into Colorado's economy and how dynamic its communities are. The LED program will release reports on a variety of topics over the upcoming months.

Bershof, S. (2005, January 31). Boomer booster: Temp firm helps harder-to-place older workers. *Denver Business Journal*. Retrieved November 6, 2006, from <http://denver.bizjournals.com/bizwomen/denver/content/story.html?id=1053687>

In 2004, Stephanie Klein founded the Boomer Group located in Denver, a staffing company that matches baby boomers looking for either part-time or full-time work with employers who need experienced help. After working in staffing companies for nine years, Klein found that the boomer demographic was being underserved in the temporary work community. The Boomer Group looks at the worker's personality, previous experience, the type of pay he or she is looking for and what type of work he/she wants to do and matches the worker using the Boomer Group's company database. In 2004, she made 110 placements, with 80 percent of them temp jobs. There are several misconceptions of older workers that are not true. Such as, older workers won't learn new skills or are more expensive to keep around. On the contrary, they bring a strong commitment and relationship to their work, as well as a deep respect for work, which garners more reliability and dependability. The American workforce is getting older. The General Accounting Office's statistics predict there will be 10 million positions that go unfilled in the next 10 years. In the past, such shortfalls were avoided because the main group of American workers, those between age 25 and 54, always managed to replace the previous generation, according to the Bureau of Labor Statistics (BLS). Because of the aging population, the 25-to-54 age group will increase by only 5 percent between 2002 and 2012. Meanwhile, the group of workers 55 and older will increase by 49 percent. BLS also said workers between 45 and 54 stay on the job twice as long as those 24 to 34—which saves on recruiting, hiring and training costs. Older workers aren't as prepared for retirement compared with workers today. The younger generations are much more informed about savings accounts. It is estimated that Social Security accounts for just 40 percent of the average retired worker's income, and employer-funded pension plans have declined greatly in the last few decades, making retirees much more dependent on savings accounts.

McGhee, T. (2006, December 4). Baby boomers rethinking retirement. *Denver Post*. Retrieved December 4, 2006, from www.denverpost.com

Many baby boomers will seek re-education over the next few years as they retool to take on second careers. The American Association of Community Colleges is reviewing ways to meet the expected rush of older students at the nation's 1,200

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community colleges. They are talking about what might happen and looking at what colleges are doing. Many community colleges have had programs for seniors, but they tended to be things like art appreciation. They are talking about programs that are more substantive. Many boomers are expected to gravitate toward jobs like teaching, nursing and other service professions, and many will need to work because they haven't saved enough to retire. The Colorado Community College System, which oversees 13 community colleges, is beginning a review of demographic and other information to decide how best to serve students in the future. Companies that contact Arapahoe Community College, for example, to recruit students are expressing more interest than in the past in hiring older workers. The older students, many of them boomers, need less training, and in many cases they have a stronger work ethic than their juniors. So far, Arapahoe hasn't experienced an increase in the number of older students. About 20 percent of students are older than 40, and 64 percent of all students are women.

Greene, K. (2006, July 31). Publishers scurry after aging boomers. *Rocky Mountain News*, p. 4B.

A growing number of new ventures are targeting aging baby boomers, their obsessions in the final third of their lives—and their \$2 trillion in annual spending power. Startup magazines are beckoning to boomers with advice on triathlons, grandchildren or new careers. Advertisers of everything from autos to electronics have traditionally preferred to link their brand images with younger consumers, and they reveled in baby boomers as children and teens in decades past. Now the question is: Will marketers have any use for them when they are 64? A lot of corporations have openly embraced the idea that most of their customers are over 50, but they aren't ready to publicly recognize it. There's been a sensitivity to not want to skew too old. History suggests that it won't be easy. The magazine industry tried once before to cash in on boomer demographics, when the oldest boomers started turning 40 in the 1980s. The titles all failed. Some media entrepreneurs this time around are slicing and dicing the interests of older adults into smaller niches. A magazine and Web site in development plans to focus on health, beauty and fitness for boomer women. Other examples of media aimed at boomers: The founder of Monster.com is launching Eons.com a kind of MySpace for the 50-plus crowd; Retirement Living TV is set to hit cable TV in September; What's Next Media has launched a Web site geared toward 45-to 64-year-old men, addressing all forms of life transitions, and a magazine is set to launch in 2007.

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National Press on Boomers

Novelli, B. (2006). The time is now! Excerpt from *50+ Igniting a revolution to reinvent America*. St. Martin's Press.

People thinking about retirement now have the opportunity to create a better quality of life, leave a legacy to our country, and ignite a revolution that will change the way we think about aging in America. Following are a few of the many exciting opportunities for reinventing America:

1. Transforming Health Care—The members of the 50+ generation smoke less than their parents' generation, get more and better medical treatment, have less heart disease, and suffer fewer strokes and disabilities. One critical first step is to bring medical recordkeeping into the 21st century. Today, many medical records are still kept on paper and must be mailed or faxed among health care providers. The exchange of information is slow and costly.
2. Reinventing Retirement—The 50+ generation does not want to be moved to the sidelines of society. More than 70 percent of people over 45 want to continue working into their so-called retirement years. Whether they change careers, start a new business, do volunteer work, learn a new discipline or phase into part-time work, they want to be part of the action.
3. Building Livable Communities—We must work together to ensure that the needs for age-friendly housing, mobility and community engagement are met for older Americans. We must remind our elected representatives that quality of life is sustained by keeping people in their homes, where they can stay connected to family, friends of all ages and familiar surroundings. We need to advocate at the state and local levels for building and zoning regulations that promote both age-friendly new housing and older-home renovations.

Trafford, A. (2006, November 14). Power to the grandparents. *Washington Post*, p. HE06.

Nancy Pelosi is a 66-year-old grandmother and the first woman to become Speaker of the House. She reflects a profound change that is occurring in society. People are living longer, healthier lives, and as grandparents, they want to stay in the political discourse. The increase in "health span"—years of healthy vigor and productivity—is changing attitudes about aging and creating new expectations that older men and women will remain active and stay in the mainstream of public life. Last month, the reauthorization of the Older Americans Act took place, and it included important provisions to promote work and community service, calling for "a comprehensive strategy for utilizing older individuals to address critical local needs of national concern." For the first time, the act defined the term "civic engagement" as "an individual or collective action designed to address a public concern or an unmet human, educational, health care, environmental or public safety need." In other words: Uncle Sam needs grandparents to make the world a better place for future generations.

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Freedman, M. (2005, February 6). The selling of retirement, and how we bought it. *Washington Post*.

In 1960, through the magic of marketing, retirement no longer meant only the end of work. It was sold as the beginning of a new, even better life. Take, for example, the Sun City retirement community, which launched in 1960 as the first large-scale venture of its kind. The success of Sun City was fueled not only by effective marketing but by the pent-up demand from people who were unhappy. A gradual marginalization of older people had taken place over the previous 25 years. The word retirement itself contributes to this conclusion; it comes from the old French *retirir*, meaning "to go off into seclusion." To make retirement more appetizing, pension and annuity marketers in the 1950s seized on the notion of aristocratic leisure, depicting retirement not as a fate for people too old to work yet too young to die, but as an age of liberation—from responsibility, from work, from the constraints of midlife. In a relatively brief period, the ideal of aging had been transformed into one of an endless vacation. In 1950, half the men 65 and older remained in the workforce. By 2000, the number was less than 18 percent. Soon the goal of retirement was replaced by a new dream: early retirement. Now, America finds itself in a demographic revolution, propelled by the aging baby boomers. By 2030, these individuals will make up between 20 and 25 percent of the overall population. Paired with the fact that people now live longer, retirement is seldom thought of as a final stage of life but rather as an interlude between stages. More and more people are "retiring" for a period to catch their breath before making the transition into a new chapter of life. The vast majority of boomers plan to continue working during their 60s and 70s. This new generation of aging boomers is ready to swap that old dream of the freedom *from* work for a new one built around the freedom *to* work—in new ways, on new terms, to new ends. Reinventing retirement will require a new generation of policies, pathways and priorities. We must create an aging America that swaps the old leisure ideal for one that balances the joys and responsibilities of engagement across the life span. And that could produce a society that works better for all generations.

Fulmer, M. Retirees return to campus living. Microsoft Network. Retrieved February 6, 2007, from <http://realestate.msn.com/buying/Article2.aspx?cp-documentid=1122316>.

On-campus senior housing communities are sprouting throughout the country. Many active seniors are returning to their alma maters, lured by fond college memories, good hospitals and the proximity of rich entertainment and cultural events. It is like living in a dormitory but with nicer furnishings and a bit more privacy. At The Village at Penn State, the 212 residents take exercise classes together, dine in groups at its on-site restaurant and attend lectures, concerts and other events on campus. About 60 college- or university-linked senior housing projects have been built in the U.S., many at such prestigious schools as the University of Michigan, Stanford, Dartmouth, Notre Dame and Oberlin. An additional 30 are under construction or in some stage of planning. Developers are betting that today's seniors and tomorrow's baby boomer retirees don't want to be isolated in age-restricted communities. This is an age group that doesn't consider itself old. It wants the liveliness and energy that comes from being around younger people. The costs of these living arrangements, however, can be significant. Residents can pay up to six-figure deposits for an assurance that they will be taken care of after they can no longer take care of themselves. Each resident also pays a monthly fee that can run up to \$3,000 or \$4,000 for dining, housekeeping, transportation and other services. At Stanford's new senior housing community, there are three levels of care for residents. Residents start out in their own apartments but are then able to move into assisted living and ultimately skilled nursing beds as their health fails, without their monthly payments rising significantly. Having seniors nearby

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can prove useful for the university. Students and interns can access the residents in order to gain experience in their field (i.e., teach an exercise class or give fitness coaching, physical therapy, medical interns work at the wellness center). Senior communities on college campuses are just the next step in a move toward more intergenerational retirement housing.

Anyone want to lend a hand? (1998, July 20). *Business Week*. Retrieved November 1, 2006, from www.businessweek.com/1998/29/b3587036.html

Retirees are breathing new life into the world of volunteerism. They are leaving their careers healthier and more active than the generations before and are finding a host of volunteer opportunities. By demanding assignments that will challenge them just as their careers did, they are changing the nature of volunteerism. According to the director of the Center on Aging at the University of Maryland, "These people are looking for more meaningful activities but the systems they may want (to serve) are not yet strong enough." To find a good fit, would-be volunteers should consider a nonprofit commitment with the same critical eye used to assess job offers. The opportunity should have a clear job description with time commitments and scheduling flexibility. The organization should offer an orientation at which volunteers learn the nonprofit's history as well as performance expectations. A volunteer coordinator should be available to answer questions, set schedules, and communicate with clients and volunteers. For many, it's also important that the work provide companionship, either with other volunteers or with clients. Government and national service agencies can be good clearinghouses for information. Some of the most exciting prospects have come out of projects created by retirees to meet community needs. The Robert Wood Johnson Foundation recently funded Reach Out, a system of 39 clinics staffed partly by retired doctors and serving uninsured patients. Christmas in April, a national program in which retirees do minor repairs of the homes of poor and elderly people one day in April, began as the brainchild of a retired Baltimore doctor. After seeing the National Guard's Project Challenge camps for troubled teens, a former RSVP volunteer set up a similar boot-camp-style school staffed mostly by retired military people and defense workers

Emerging Models for Engaging Boomers in Work, Service and Learning

1. Civic Ventures: The Next Chapter initiative—National
2. Piper Trust: The Next Chapter Initiative—Arizona
3. Institute for Life Work (IFL)—Colorado
4. Volunteers in Medicine Institute (VIMI)—National
5. Colorado State University—Alumni College
6. Colorado Academy of Lifelong Learning
7. Colorado State University—OSHER Lifelong Learning Institute
8. University of Denver—VIVA program (Vibrant, Intellectually Vigorous Adults!)
9. Elderhostel Colorado
10. My Retirement by Design (personal coach in Denver)
11. The Denver Foundation's Hope for Generations
12. Senior Corps of Retired Executives
13. Legacy Denver
14. The Boomer Group

Emerging Models in Work, Service and Learning

There are many individual programs and classes available to adults 55 to 65. However, the descriptions below are examples of **emerging models** for engaging baby boomers in work, service and learning.

1. Civic Ventures: The Next Chapter Initiative—National <http://www.civicventures.org/nextchapter/overview.cfm>

The Next Chapter initiative provides expertise and assistance to community groups across the country working to help people in the second half of life set a course, connect with peers and find pathways to significant service. The Next Chapter is a program of Civic Ventures, a national nonprofit organization working to help society achieve the greatest return on experience. Local Next Chapter projects and related programs exist in dozens of communities nationwide. The Next Chapter is a new way of thinking and acting about aging in America. Its emphasis is on guiding adults toward a productive and satisfying transition to the second half of life. While most Next Chapter projects provide a wide array of services to help people with this transition, Civic Ventures' focus is on helping people apply their lifetime of experience to help solve serious community problems.

The Next Chapter initiative calls on communities to create new institutional approaches that help adults make the transition to a new productive life phase by providing support and community connections for ongoing learning, development and contribution to society. To that end, The Next Chapter initiative works with local communities to create places and/or programs that offer adults four key components:

- Life planning programs—help in assessing their status and strengths, exploring future possibilities and setting goals
- Meaningful engagement through work and service—opportunities to take on public service roles, through paid work and volunteer service
- Continued learning for new directions—learning options to enrich their lives and retool for new careers
- Peer and community connections—places and programs to connect with people of all ages in their community

In addition to these core components, The Next Chapter initiative encourages optional components that offer help with issues such as caregiving, employment, financial planning, leadership development, relationships, spirituality, technology and information literacy, and wellness.

Examples from the field (listed by key component):

LIFE PLANNING

Chicago Life Opportunities Initiative, Council for the Jewish Elderly, Chicago, IL
As part of the Chicago Life Opportunities Initiative, the Council for the Jewish Elderly, in conjunction with Loyola University School of Social Work, created an assessment tool called, "Mapping your future your way." The tool can be used online or in a printed version. Mapping Your Future helps people understand the need for planning and begin to explore their interests in five areas—health, work and leisure, finances, housing, and relationships. For each topic, the tool provides a framework of issues to

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think about and the online version links to other Web sites with related information.
www.cje.net/lifestyle/your_future.html

MEANINGFUL ENGAGEMENT THROUGH WORK AND SERVICE

Retired Social Workers—An Untapped Resource, National Association of Social Workers (NASW) Illinois Chapter, Chicago, IL

The Retired Social Workers is sponsored by the NASW and encourages retired social workers to return to social work to serve older adults as paid professionals. The program includes two key components: 1) professional development to reorient retired social workers to current conditions, agency changes, and present senior issues and attitudes; and 2) placement into positions—as part-time, intermittent or full-time workers—to provide services and support for older adults. As one of its many programs, the Retired Social Workers received a grant from the Chicago Community Trust to place and pay retired social workers for the Chicago Life Opportunities Initiative.

CONTINUED LEARNING FOR NEW DIRECTIONS

Pathways for Learning, Senior Adult Education Program (SAEP), Cuyahoga Community College, Cleveland, OH

The SAEP offers classes and activities to enrich and enhance the quality of life for adults over the age of 55. Programs are held weekly on campus locations and are also delivered on-site at senior and community centers and assisted living facilities. Most classes are taught by retired instructors from the area. Pathways for Learning is operated as part of the SAEP program and is funded through The Cleveland Foundation's Successful Aging Initiative. It offers different ways for older adults to take part in holistic retirement planning. Certification and continuing education for people who work in the field of aging are also offered.

PEER AND THE COMMUNITY CONNECTIONS

Mather Café Plus, Chicago, IL

Mather Café Plus was conceived of as a Starbucks for seniors. It combines a restaurant, a gathering place and an educational center under one roof. The three Chicago-area Mather Cafés primarily serve active, independent older adults in their neighborhoods. Programs and classes on exercise, computers and art supplement the restaurant. Day trips, monthly parties and community events encourage new relationships and social interaction. Social workers and health care professionals are available to provide individual consultations and referrals. Connections with other senior groups and health care providers ensure strong support networks for those involved. The Mather Cafés are operated by the nonprofit Mather Lifeways Foundation. www.matherlifeways.com

2. Piper Trust: The Next Chapter Initiative—Arizona

<http://www.pipertrust.org/initiatives/nextchapter.aspx>

The Virginia G. Piper Charitable Trust has funded four Next Chapter projects in the East Valley that are developing programs and locations—either physical or virtual—where baby boomers who are planning retirement or who have retired can connect to learning opportunities, link to paid and volunteer opportunities, engage in civic activities and plan for the “next chapter” of their lives. In addition to helping fund the individual projects, the Trust is supporting technical assistance meetings coordinated by Civic Ventures that foster collaboration and innovation among all four projects.

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Tempe Connections provides a comprehensive one-stop resource to connect boomers and other young seniors with the information, services and programs they need to remain informed, engaged and happy members of the community. Located within the Tempe Public Library, Tempe Connections includes a café with an attached programming space where older adults can meet friends, engage in lively discussions, view art displays, listen to music on the outdoor patio, attend a lecture about a topic of interest and seek out volunteering opportunities. The Tempe Connections Cafe is open to the public, with all proceeds supporting the Tempe Connections program. A major element of Tempe Connections' civic engagement effort is Experience Corps, a program that places older adults in afterschool programs as tutors and mentors to assist struggling readers. The program will match 36 older adults with 250 students in high-poverty schools each year.

Mesa Life Options. Mesa Community College, the City of Mesa and Mesa Senior Services, Inc. have partnered with several other community organizations to assist boomers nearing retirement find "direction and connections" in the "next chapter" of their lives. Mesa Life Options (MLO) provides connections to people, organizations, programs and services that will enhance the quality of boomers' lives and the lives of those they touch. Through peer mentoring and life-planning programs, MLO participants will find new ways to share their resources, expertise and wisdom in the community. Other programs include Boomer Brown Bags, Boomer Talks and Boomer Cafes, drop-in conversations on a variety of topics of interest to boomers in transition. MLO is currently planning to develop a space within the Downtown Mesa Library specifically for boomers.

Boomerz . . . Change Yourself, Change the World, in Scottsdale, Arizona, is a community collaborative committed to creating and cultivating opportunities that allow baby boomers to maximize their contribution to society. Housed at Scottsdale Community College, Scottsdale Boomerz encourages businesses to offer flexible work alternatives, nonprofit organizations to design meaningful pro-bono opportunities and communities to fully capitalize on boomers' talents, energy, wisdom and experience. Scottsdale Boomerz has developed a Boomerz center at Scottsdale Community College that provides a welcoming place where baby boomers and the boomer-minded can discover a variety of resources to volunteer, pursue civic engagement, re-career and find employment, as well as to engage in lifelong learning, embark on healthy lifestyles and enjoy social connections in a community for all ages.

Boomerang. Chandler's Next Chapter Community has developed Boomerang as a way for baby boomers and "beyonders" to receive information, resources, programs and services. With www.myboomerang.org as a virtual entry point and the Chandler Public Library System, Sun Lakes Education Center and Chandler-Gilbert Community College as physical points of entry, Boomerang has taken a community approach to answering the question, "What's next?" The project offers information about life planning, re-careering, lifelong learning, social connections and civic engagement. From special events and traditional workshops to intimate book discussions and conversational cafes, all activities have the same goal ... living, playing and staying well.

3. Institute for Life Work (IFL)—Colorado

The Institute for Life Work (IFL), formed in 2000, works through employers to assist boomers facing retirement options. IFL's mission *is to create opportunities for experienced adults to lead fulfilling lives by contributing to society through networks*

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that focus on societal and individual needs. This includes social support, connections and direction. IFL offers services such as:

1. Life planning programs—help individuals assess their current strengths, explore future possibilities and make choices by setting goals and plans.
2. Meaningful engagement through work and service—help individuals to take on public service roles through paid work and volunteer service.
3. Continued learning for new directions—provide individuals with a range of learning options that allow them to enrich their lives and retool for new careers.
4. Peer and community connections—give individuals access to places and programs that foster connections to people of all ages in the community.

IFL also works with employers to create the conditions that allow them to retain the skills and wisdom of older workers. IFL wants to facilitate the much-needed conversation between employees and employers in an effort to meet the needs of both. IFL does this through partnerships, seminars, data collection, dialogue and planning sessions.

IFL's program allows both employees and employers to develop a strategic plan, which includes the following components:

1. Employer Needs—help management identify the information they need in order to engage in contingency planning, e.g., skills of upcoming retirees. IFL has an instrument it uses to gather the data.
2. Employee Needs—address the many issues of concern to boomers as identified by several recent local and national in-depth studies.
3. Report to Employer—a written report of the findings is prepared and discussed with management. IFL will work with management to develop policies and programs to address the pertinent concerns.
4. Employee Services—IFL makes services available to employees on a group or individual basis. Such services include but are not limited to: placement in new full-time or part-time work and, if retirement from the present employer is chosen, retraining, classes for personal growth, assistance with caregiving issues and meaningful volunteer opportunities.

IFL is in the process of forming strategic partnerships with a number of local agencies in order to assist them with their efforts. IFL is affiliating with Civic Ventures' Next Chapter initiative in order to be part of a larger network.

4. Volunteers in Medicine Institute (VIMI)—National
www.vimi.org/institute.shtml

Volunteers in Medicine (VIM) began in Hilton Head, South Carolina, in 1993, when a number of retired medical personnel (physicians, nurses, dentists) began expressing an interest in finding a way to continue practicing their profession on a voluntary, part-time basis to help those without access to care. The Volunteers in Medicine Institute (VIMI) was created in response to requests for assistance in replicating the VIM Clinic model in communities across the country. The mission of VIMI is to *promote and guide the development of a national network of free clinics emphasizing the use of retired medical and lay volunteers to care for the "working uninsured" within a culture of caring so that everyone in a community has access to health care.*

The VIM Institute (VIMI) is dedicated to assisting individuals, groups and local communities in starting free clinics for people who don't have access to health care.

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Volunteers are made up of retired physicians, nurses, dentists, social workers, pharmacists and others.

To accomplish its mission, VIMI provides:

- Consultation and assistance in how to plan, develop, operate and sustain a model VIM Clinic
- Nationally recognized speakers to help launch and support community efforts
- On-site consultation in each community
- Resource materials
- Structured tours of the original VIM Clinic in Hilton Head, SC
- Phone consultation
- Membership in the VIM Alliance, a program of the Institute composed of VIM clinics around the country with which VIMI worked during the development process
- A special online community where clinic staff can ask questions, give and receive advice, and share ideas with VIM clinics across the country

The following are features of VIMI that attract volunteers:

- The patient-focused environment at VIM Clinics is rarely found in today's fast-paced, cost-conscious primary care practices.
- VIM patients have had little or no access to health care. They need care and show their appreciation to those who volunteer to provide it.
- At VIM clinics, volunteer professionals provide service on their terms, in a relaxed, respectful atmosphere.
- Each volunteer's time commitment is up to the volunteer. VIMI recommends that retired physicians volunteer a minimum of a half-day per week. Some actually choose to provide care every day. Practicing physicians volunteer as much as their schedules permit.
- Physicians schedule their time to maximize continuity of care with patients.
- An esprit de corps among providers makes volunteering fun and supportive.
- Continuing education is required for all professionals who choose to volunteer in VIM clinics.

5. Colorado State University—Alumni College

The Division of Continuing Education is partnering with the Alumni Association to launch a new programming initiative called the Alumni College. The college has a very broad educational mission and was created in response to alumni needs and requests. The college will offer courses and workshops to help alumni and their friends with practical subjects that apply to their place in their life and career. It is accessible to residents of Denver and Northern Colorado. Courses are also available to anyone with Internet access to accommodate those who can't attend in person. The programming is designed to focus on the needs of people in various stages of life. These range from 10 to more than 30 years after college graduation. People involved in the Alumni College have shown interest in programming that includes lectures, workshops, certificate programs, professional development, enrichment, lifelong learning, distance education options and travel experiences.

Example of courses and programs offered (that are geared toward boomers):

Care Giving Issues & Implications ... When Dependency Increases

Research indicates that on average, we can expect to spend 17 years raising our children and 18 years caring for a dependent adult!

Healthy Aging - Oh the Changes You Shall See!

How prepared are you to live out the last one-third of your life? Explore the physiological aging process as it relates to normal and pathological aging.

Mentoring Certificate Series - Bringing Out Their Best

Why is mentoring so important for you, for your employees and for your business? The benefits of mentoring are numerous and focus on the building of human capital—yours and other's.

6. Colorado Academy for Lifelong Learning

<http://www.academyll.org>

The Colorado Academy for Lifelong Learning was formed in December 2002 by a group of like-minded men and women seeking to bring stimulating intellectual, cultural and social opportunities to adults in the Denver area. The founders are volunteers whose only objective is to serve the membership.

There are over 500 Lifelong Learning Institutes (LLIs,) nationwide devoted to the same goals. Each is tailored to the individual needs and tastes of its community. The Academy is neither politically nor financially linked to any of the other LLIs. There is just a shared common objective of lifelong learning.

Objective: The objective is to deliver the highest quality educational offerings possible at the lowest possible cost to the participants.

What is the Academy?

The Academy is a group of adults gathered together to design and enjoy adventures in learning. The academic and cultural courses are available to adults with flexible hours. Courses are offered in south Denver. There are no examinations, grades or prerequisites other than a love of learning. You must be a member to sign up for a class.

The membership fee for the two-term academic year is \$30, or \$20 for just one term. Tuition fees range from \$25 to \$60.

7. Colorado State University—OSHER Lifelong Learning Institute

<http://www.learn.colostate.edu/osher/default.asp>

In partnership with the [Bernard Osher Foundation](#), the Osher Lifelong Learning Institute (OLLI) at Colorado State University is an innovative educational program. The program is designed to help people 50 and older renew their enthusiasm for learning in a relaxed atmosphere.

Instructors are distinguished active and emeritus faculty, scholars and professionals in the community. The emphasis of the courses offerings is increasing knowledge, engagement and community building.

Membership Benefits:

- Special member rates on OLLI courses and programs
- Up-to-date information regarding OLLI activities and upcoming programs through e-mails and newsletters

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- Priority notification and registration for courses
- Access to CSU resources, including the library and adult fitness programs
- Assistance with CSU campus parking for OLLI programs
- Networking receptions for members only

8. University of Denver—VIVA program (Vibrant, Intellectually Vigorous Adults!)

<http://universitycollege.du.edu/program/ppe/viva/index.asp>

As a program of the Osher Lifelong Learning Institute, VIVA! was created for men and women age 55 and “better” who wish to pursue lifelong learning in the company of like-minded peers. “Vibrant, Intellectually, Vigorous Adults!” provides a unique curriculum designed by the members themselves. VIVA! members select the topics and share their expertise and interests while serving as teachers and learners. VIVA! is attended by people from diverse backgrounds and professions who share the desire to stay intellectually active and fit. Enriched by the resources of the University, VIVA! brings members together in a relaxed, non-competitive atmosphere to discover new things about the world and themselves.

VIVA! meets for three quarters, each lasting eight weeks. Classes are held in a convenient community location with plentiful, close-in parking. Persons over 55 are eligible for membership. There are no academic or experience qualifications. VIVA! does not discriminate on the basis of admissions or programs on the base of race, religion, national origin, gender or disability. Members may take part in as many activities as they desire. Limited, partial scholarships are available. Call the VIVA! office for information. All requests are confidential.

9. Elderhostel Colorado

<http://www.elderhostel.org/programs/state.asp?whatState=CO>

Elderhostel is a nonprofit organization dedicated to providing extraordinary learning adventures for people 55 and over. Whether you want to stay close to home or venture around the world, you will find programs that meet your interests, activity level, budget, schedule and lifestyle.

Discover more than 8,000 all-inclusive learning adventures in all 50 states and more than 90 countries abroad. Unlike tour companies, Elderhostel offers in-depth and behind-the-scenes learning experiences for almost every interest and ability. History, culture, nature, music, outdoor activities such as walking and biking, individual skills, crafts, study cruises.

10. My Retirement by Design (personal coach in Denver)

<http://www.myretirementbydesign.com/meet.html>

The following is an example of a personal coach for Retirement Planning. The following information is taken from the Web site.

Are you ready to design the next chapter of your life?
Are you ready to live life on your own terms?
If the answer is "yes," you need my help!

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I am a Retirement Success Profile (RSP)©—TRAINED RETIREMENT COACH.

What are the benefits of retirement coaching?

- *Personal coaching from a trained retirement professional
- *Provides a clear picture of your retirement standing
- *Helps formulate "next step actions"
- *Positions you for heightened personal meaning
- *Helps avoid costly retirement "mistakes"
- *Helps crystallize your retirement vision
- *Confirms retirement plans

The Retirement Options© coaching program and Retirement Success Profile (RSP)© will help you generate options for a successful and enriching retirement life.

Coaching is a partnership between the client and the coach that assists you in gaining clarity and focus about what you want and how you can achieve it.

Coaching may, for example, help you:

- Discover and develop your path to your future
- Support you in capturing your dreams of how you want your life to be by actually achieving them
- Assist you in creating & developing a newfound focus, skill and motivation that you may not have felt in the past
- Move out of that rut you feel like you are in

11. The Denver Foundation's Hope for Generations was created in 2002 when a group of individuals realized that the income they were receiving from their Social Security payments was more than they needed to put food on the table. They also recognized that children make up the largest segment of society living in poverty and decided to pool their Social Security income and other charitable contributions to help these children. Working with The Denver Foundation, contributions from donors are pooled and used to make grants to organizations serving children in their early childhood years. A board of advisors makes decisions on which organizations receive funding. Donors meet periodically to share ideas and to hear about the differences their contributions have made in the lives of needy children and seniors.

12. Senior Corps of Retired Executives (SCORE), a 501(c)(3), is part of a national organization that gives business guidance to individuals in all age groups, but has a high percentage of participants who are in the boomer age range. The Denver chapter has been in existence for 40 years and has 75 volunteer members or counselors. SCORE helps individuals with start up businesses by helping them develop their business plan and find sources of financing for free. For people who are already in business. SCORE helps with marketing, cash flow guidance, or taking on new product groups.

More details about these models are found in the literature review.

13. Legacy Denver is a program of Denver Metro Chamber Foundation. Young executives from all sectors (government, corporate and nonprofit) apply to participate in this competitive program, which runs for six months and includes monthly luncheon meetings that allow a small cohort of six to seven young executives to meet with the retired-age volunteer executives.

14. The Boomer Group was founded in 2004 by Stephanie Klein. This Denver company matches baby boomers looking for either part-time or full-time work with employers who need experienced help. After working in staffing companies for nine years, Klein found that the boomer demographic was being underserved in the temporary work community. The Boomer Group looks at the worker's personality, previous experience, the type of pay he or she is looking for and what type of work he/she wants to do and matches the worker using the Boomer Group's company database. In 2004, she made 110 placements, with 80 percent of them temp jobs.

Appendix B
Survey Instruments

The Colorado Boomer Survey

Two Colorado foundations, Rose Community Foundation and The Colorado Trust, are interested in the desires and interests of adults 55 to 65. We want to know how you want to remain engaged in the community in the following areas: **Employment, Service and Education**. Your feedback will help us consider more opportunities for adults 55 to 65 who are transitioning to a new productive phase of their life. We value your thoughts, and all responses will be kept confidential by JVA Consulting, an independent evaluation and consulting firm that is conducting this study. Thank you for taking the time to answer the questions below.

1. Which of the following best describes your current employment status:

- | | | |
|---|---|--|
| <input type="checkbox"/> Employed full time | <input type="checkbox"/> Not in the labor force | <input type="checkbox"/> Self-employed |
| <input type="checkbox"/> Employed part time | <input type="checkbox"/> Retired (not working) | <input type="checkbox"/> Unemployed and seeking work |

2. Which will most likely describe your employment status 10 years from now? (Check only one)

- | | | |
|--|--|---|
| <input type="checkbox"/> Between jobs | <input type="checkbox"/> Retired | <input type="checkbox"/> Working part time |
| <input type="checkbox"/> Fully engaged in job/career | <input type="checkbox"/> Self-employed | <input type="checkbox"/> Not in the labor force |

3. Rate each of the following statements based on whether it is something you have already done, would like to do, would not like to do or are already doing. (Check all that apply)

Your plans	<i>Already done</i>	<i>Currently doing</i>	<i>Would like to do</i>	<i>Would not like to do</i>
Be available to spend time with family & friends				
Change to part-time or flexible work				
Get involved in politics (e.g., work on a campaign, run for office)				
Have a leadership role in a nonprofit organization (e.g., serve boards, etc.)				
Make a major career change				
Retire and not work				
Return to school				
Seek job training				
Start your own business				
Take classes for fun				
Teach				
Travel combining work, service an/or learning				
Travel for fun				
Volunteer				

4. As you contemplate the next phase of your life, how important would each of the following factors be in your decision on what to do next (in employment, service or learning)?

Factors	<i>Not at all Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Very Important</i>
Ability to collect pension or Social Security without penalty				
Ability to do meaningful, interesting or challenging work				
Being able to stay involved with other people (i.e., social connectedness)				
Flexible work schedule				
Getting paid				
Health care benefits				
Option to work part time				
Opportunity to help improve the quality of life in your community				
The opportunity to mentor or train younger people				
Retirement benefits				
Situation that provides opportunities for growth and career development				
Supportive work environment/culture				

Factors	Not at all Important	Somewhat Important	Important	Very Important
Training or education opportunities				
Work that is different from your previous work (i.e., a change in career)				

5. Do you currently volunteer for any organization(s) or project(s) that help people in the community?

☐ Yes ☐ No (If No, skip to #9)

6. If so, approximately how many hours per month?

☐ 1-5 ☐ 6-10 ☐ 11-15 ☐ 16-25 ☐ 26-40 ☐ More than 40

7. How did you get involved in volunteering?

- | | |
|---|--|
| <input type="checkbox"/> I am a long-time volunteer for an organization/cause I support | <input type="checkbox"/> I sought out the opportunity because of a special interest or passion |
| <input type="checkbox"/> I am part of social group or club that does volunteer work | <input type="checkbox"/> I volunteer through a program at work |
| <input type="checkbox"/> I responded to an ad or article | <input type="checkbox"/> Someone I know got me involved |
| | <input type="checkbox"/> Other (please describe): _____ |

8. In volunteering, how important are each of the following as either motivation for or benefits of your volunteering?

Motivation or benefits for volunteering	Not at all important	Somewhat important	Important	Very important
Develop leadership skills				
Do meaningful work that may lead to paid employment				
Feel productive				
Gain practical knowledge and skills				
Get "freebies" or opportunities in exchange for my time				
Have a flexible schedule				
Help my community				
Make a valuable impact to organization				
Mentor others				
Meet new people				
Obtain health benefits				
Use my special expertise (e.g., legal, accounting, medical, marketing)				
Opportunity to do a variety of different activities				
Opportunity to follow a career ladder				
Provide direct service to clients				
Serve in a leadership role on a nonprofit board or commission				
Volunteer for an organization/cause that I care about				

9. If you don't currently volunteer, or don't volunteer as much as you would like to, what are the reasons? (Check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Family obligations | <input type="checkbox"/> It's not a priority in my life |
| <input type="checkbox"/> I can't afford to volunteer | <input type="checkbox"/> No opportunity to use my knowledge, skills and talents |
| <input type="checkbox"/> I do not care for the nonprofit organizational culture | <input type="checkbox"/> Opportunities do not fit my schedule |
| <input type="checkbox"/> I don't feel valued as a volunteer | <input type="checkbox"/> Personal health problems |
| <input type="checkbox"/> I don't have time | <input type="checkbox"/> Volunteering does not satisfy my interests |
| <input type="checkbox"/> I don't know how to get involved | <input type="checkbox"/> Other (please describe): _____ |
| <input type="checkbox"/> I have had negative experiences as a volunteer | _____ |
| <input type="checkbox"/> I would like to get paid | |

10. If you checked that you had a negative experience, please describe that experience here.

11. If you plan to participate in lifelong learning opportunities in the next phase in your life, please check your primary motivations to participate. (Please check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> To have an opportunity to socialize and network | <input type="checkbox"/> To prepare for different or new career |
| <input type="checkbox"/> To increase pay | <input type="checkbox"/> To learn for other reasons (please describe): _____ |
| <input type="checkbox"/> To learn for the love of learning | |
| <input type="checkbox"/> To maintain or augment current job skills | |

12. What types of learning opportunities would you be interested in pursuing? Check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Accelerated Program | <input type="checkbox"/> Lectures/symposium |
| <input type="checkbox"/> Certificate programs (learning special skills/knowledge in areas such as business real estate, marketing, human resources) | <input type="checkbox"/> Professional development (i.e., courses in leadership, management, entrepreneurship) |
| <input type="checkbox"/> College courses for academic credit | <input type="checkbox"/> Social events (i.e., informal gatherings of peers) |
| <input type="checkbox"/> Courses for college credit | <input type="checkbox"/> Travel experiences |
| <input type="checkbox"/> Distance learning (i.e., online courses or training) | <input type="checkbox"/> Workshops/seminars |
| <input type="checkbox"/> Enrichment and lifelong learning | <input type="checkbox"/> Other (please list): _____ |
| <input type="checkbox"/> Job training program (i.e., skills training employment assistance) | |

13. As you contemplate the next phase of your life, please check any of the following issues in which you have a HIGH LEVEL OF INTEREST IN BECOMING PERSONALLY INVOLVED either through work, volunteering or education/learning.

Community/Global Issues	Work	Volunteering	Learning	No interest
Advocacy				
Arts and Culture				
Children's Issues				
Civic Leadership				
Disaster Relief				
Education				
Environment				
Faith-based Activities				
Health Care				
Helping Older Adults				
Homelessness				
Housing				
Human Rights/Social Justice				
International Aid				
Minority Issues				
Neighborhood Work				
Poverty				
Public Policy Work				
Women's Issues				
Youth				

14. If there is another issue in which you have a HIGH LEVEL OF INTEREST IN BECOMING PERSONALLY INVOLVED please list here _____

15. What is your age? ☐ 50-54 ☐ 55-59 ☐ 60-64 ☐ 65-70 ☐ Older than 70

16. **Are you:** ☐ Female ☐ Male
17. **Are you:** ☐ Never married ☐ Married ☐ Separated ☐ Living w/partner ☐ Divorced ☐ Widowed
18. **In what county do you reside?** _____

19. **Which of the following best describes you:**

- | | | |
|--|---|---|
| <input type="checkbox"/> American Indian/Alaska Native | <input type="checkbox"/> Hispanic/Latino | <input type="checkbox"/> White, non-Hispanic |
| <input type="checkbox"/> Asian | <input type="checkbox"/> Native Hawaiian/Pacific Islander | <input type="checkbox"/> Self-identify: _____ |
| <input type="checkbox"/> Black/African American | | |

20. **In 2006, what was your total household income from all sources before taxes?**

- | | | |
|---|---|--|
| <input type="checkbox"/> Less than \$20,000 | <input type="checkbox"/> \$35,000 to \$55,000 | <input type="checkbox"/> \$75,000 to \$100,000 |
| <input type="checkbox"/> \$20,000 to \$35,000 | <input type="checkbox"/> \$55,000 to \$75,000 | <input type="checkbox"/> Over \$100,000 |

21. **Are you the primary income earner in your household?** ☐ Yes ☐ No

22. **Are you now covered by any of the following forms of health insurance?**

- ☐ Medicaid ☐ Medicare ☐ Working part time ☐ Private health insurance ☐ Not insured

23. **Are you currently receiving Social Security benefits or a pension?** ☐ Yes ☐ No

24. **Are you currently responsible for caring for an aging family member or friend?** ☐ Yes ☐ No

25. **Are you currently responsible for caring for a child under 18 years?** ☐ Yes ☐ No

26. **How long have you been living in the United States?**

- ☐ All my life ☐ Less than 10 years ☐ 11-25 years ☐ 26-50 years

27. **As you contemplate the next phase of your life, do you know where to go to find what is next for you (whether it be a job, a volunteering or service opportunity, or an educational experience)?** ☐ Yes ☐ No

28. **If yes, write in where you would go (please be specific):** _____

29. **How do you plan to contribute to issues or causes you care about? (Check all that apply)**

- | | |
|--|--|
| <input type="checkbox"/> Volunteer my time | <input type="checkbox"/> Make financial gifts to issues, causes, or organizations I care about |
| <input type="checkbox"/> Work for a nonprofit | <input type="checkbox"/> I don't plan to contribute |
| <input type="checkbox"/> Engage in advocacy activities | |

30. **Retirement means different things to different people. What is it that YOU would like to do during the next phase of your life?**

31. **What is your religious affiliation?**

- | | | |
|------------------------------------|---------------------------------|--|
| <input type="checkbox"/> Buddhist | <input type="checkbox"/> Hindu | <input type="checkbox"/> Protestant |
| <input type="checkbox"/> Catholic | <input type="checkbox"/> Jewish | <input type="checkbox"/> Spiritual/nonaffiliated |
| <input type="checkbox"/> Christian | <input type="checkbox"/> Muslim | <input type="checkbox"/> Other (please specify): _____ |
- _____

Thank you for completing the survey!

The Colorado Boomer Survey

Dos fundaciones de Colorado, Rose Community Foundation y The Colorado Trust, están interesados en los deseos e intereses de adultos entre 55 y 65. Queremos saber cómo es que usted quiere continuar a tomar parte en la comunidad en las siguientes áreas : el empleo, el servicio y la educación. Sus opiniones nos ayudarán a considerar más oportunidades para adultos entre 55 y 65 que están cambiando a una nueva etapa en sus vidas. Valoramos sus pensamientos, y todas sus respuestas serán mantenidas confidencial por JVA Consulting, una compañía de evaluación y consultoría independiente que realiza este estudio. Gracias por tomar el tiempo de contestar las preguntas que siguen.

1. ¿Cuál de los siguientes mejor describe su actual situación de empleo?

- | | | |
|---|---|--|
| <input type="checkbox"/> Empleado tiempo completo | <input type="checkbox"/> No esta en la fuerza laboral | <input type="checkbox"/> Empleado por cuenta propia |
| <input type="checkbox"/> Empleado medio tiempo | <input type="checkbox"/> Jubilado (no trabaja) | <input type="checkbox"/> Entre empleo (Busco empleo) |

¿En 10 años, cuales de las siguientes opciones mejor describe su situación de empleo?

- | | | |
|--|---|--|
| <input type="checkbox"/> Entre trabajos (Busco empleo) | <input type="checkbox"/> Jubilado | <input type="checkbox"/> Empleado medio tiempo |
| <input type="checkbox"/> Completamente ocupado en empleo o profesión | <input type="checkbox"/> Empleado por cuenta propia | <input type="checkbox"/> No esta en la fuerza laboral (no busca trabajo) |

2. Califica cada una de las declaraciones siguientes basadas en si es algo que usted ya ha hecho, querría hacer, no quiere hacer, o ya hace. (Marque todo lo que aplica)

Sus planes	Ya ha hecho	Haciendo actualmente	Querría hacer	No querría hacer
Tener tiempo libre para estar con la familia y amigos				
Cambiar a un trabajo de medio tiempo o trabajo flexible				
Involucrarme en la política (trabajar con una campaña electoral)				
Tener un papel del liderazgo en una organización sin fines de lucro (servir en la mesa directiva, etc.)				
Hacer un cambio importante de carrera				
Jubilarme y no trabajar				
Regresar a estudiar				
Buscar entrenamiento de trabajo				
Comenzar un negocio				
Tomar clases por diversión				
Enseñar				
Combinar trabajo, servicio y/o aprendizaje con viajes				
Viajar por diversión				
Ser voluntario				

3. ¿Cuando usted contempla la próxima fase de su vida, que tan importante es cada uno de los siguientes elementos en su decisión en qué va a hacer (en el empleo, el servicio o aprendizaje)?

Elementos	Sin importancia	Algo importante	Importante	Muy Importante
Ser elegible para cobrar la pensión o la Seguridad Social sin penalidad				
La oportunidad de hacer un trabajo importante, interesante, y desafiante				
La oportunidad de continuar una vida social				
Un trabajo con horario flexible				
Recibir un sueldo				
Beneficios de Salud				
Opción de trabajar a medio tiempo				
Oportunidad de ayudar en mejorar la calidad de vida en mi comunidad				

Elementos	Sin importancia	Algo importante	Importante	Muy importante
Oportunidad de ser mentor de jóvenes				
Beneficios de Jubilación				
Situación que proviene oportunidades para crecer y desarrollar una carrera laboral				
Un trabajo donde te sientas apoyado				
Oportunidades de entrenamiento o educación				
Un trabajo que es diferente a tu trabajo anterior (cambiar su carrera laboral)				

5. Actualmente, ¿es voluntario de alguna organización(es) o proyecto(s) que ayudan personas en la comunidad? ☐ Si ☐ No (Si, No saltar a #9)

6. De ser así, ¿aproximadamente cuantas horas por mes?

☐ 1-5 ☐ 6-10 ☐ 11-15 ☐ 16-25 ☐ 26-40 ☐ Mas de 40

7. ¿Cómo te involucraste en ser voluntario?

- ☐ He sido voluntario por mucho tiempo en la organización o causa que apoyo
- ☐ Fормo parte de un grupo o club social que trabajan voluntariamente
- ☐ Respondí a un anuncio o artículo
- ☐ Busqué la oportunidad por un interés o pasión especial
- ☐ Soy voluntario con un programa ofrecido por el trabajo
- ☐ Alguien que yo conozco me involucro
- ☐ Otro (Por favor describa) _____

8. En ser voluntario, ¿que tan importante son cada uno del siguientes como motivo o beneficio para ser voluntario?

El motivo o beneficio de ser voluntario	Sin importancia	Algo importante	Importante	Muy importante
Desarrollar las habilidades de liderazgo				
Hacer trabajo significativo que puede terminar en empleo pagado				
Sentirse productivo				
Ganar conocimientos prácticos y capacidad (aptitud)				
Recibir regalos u oportunidades a cambio de mi tiempo				
Tener un horario flexible				
Ayudar a mi comunidad				
Hacer un impacto valioso a una organización				
Ser un mentor				
Conocer nuevas personas				
Obtener beneficios de salud				
Utilizar mi conocimiento especial (legal, contaduría, médico, publicidad)				
La oportunidad de hacer una variedad de actividades diferentes				
La oportunidad de seguir un plan profesional				
Proporcionar servicio directo a clientes				
Servir en un papel de liderazgo en una mesa directiva para una organización no lucrativa o comisión				
Ser voluntario para una organización/causa en la que tengo interés				

9. ¿Si usted no es voluntario actualmente, o si no puede ser voluntario tanto como le gusta, cuales son sus razones? (Marque todo lo que aplica)

- ☐ Obligaciones familiares
- ☐ Económicamente, no puedo ser voluntario
- ☐ No me gusta la cultura de organizaciones no lucrativas
- ☐ No me siento valorado como un voluntario
- ☐ No tengo tiempo
- ☐ No sé cómo involucrarme
- ☐ He tenido experiencias negativas como un voluntario

- ☐ Me gustaría que me paguen
- ☐ No es una prioridad en mi vida
- ☐ No tengo la oportunidad de utilizar mi sabiduría, habilidades y talentos
- ☐ Las oportunidades no concuerdan con mi horario

- ☐ Problemas personales de salud
- ☐ Ser voluntario no satisface mis intereses
- ☐ Otro (por favor describa) _____

10. Si usted seleccionó que tuvo una experiencia negativa, favor de decirnos lo que pasó aquí.

11. Si usted planea tomar parte en oportunidades de aprendizaje de toda la vida en la próxima etapa de su vida, favor de marcar sus motivos primarios para participar.

- ☐ Para tener una oportunidad de socializar y hacer contactos
- ☐ Para aumentar el sueldo
- ☐ Para aprender por el amor de aprender
- ☐ Para mantener o aumentar las habilidades actuales del trabajo
- ☐ Para preparar para una carrera nueva o diferente
- ☐ Para aprender por otras razones (favor de aclarar) _____

12. ¿En qué tipo de oportunidades de aprendizaje esta interesado?

- ☐ Curso intensivo (acelerado)
- ☐ Programa de certificado (aprendizaje de habilidades especiales en áreas tales como negocios, bienes raíces, publicidad, recursos humanos)
- ☐ Cursos de universidad para crédito académico
- ☐ Cursos para el crédito de universidad
- ☐ El aprendizaje de distancia (cursos o entrenamientos dados por la red)
- ☐ Enriquecimiento y aprendizaje de toda la vida
- ☐ Programas de entrenamiento del trabajo (entrenamiento que ayuda aumentar las habilidades, ayuda de empleo)
- ☐ Conferencias o simposios
- ☐ El desarrollo profesional (cursos de liderazgo, administración, iniciativa empresarial)
- ☐ Eventos sociales (las reuniones informales)
- ☐ Experiencias de viaje
- ☐ Talleres o seminarios
- ☐ Otro (favor de aclarar) _____

13. Mientras usted considera la próxima etapa de su vida, favor de marcar cualquiera de los asuntos siguientes en los que usted tiene un INTERES ALTO DE ESTAR INVOLUCRADO PERSONALMENTE a través del trabajo, o por ser voluntario, o el aprendizaje y la educación.

La comunidad/los asuntos globales	Trabajo	Voluntario	Aprendizaje	Ningún Interés
Grupos de presión (que abogan por ciertas causas)				
La Cultura y Artes				
Asuntos de Niños				
Liderazgo Civil				
Alivio del Desastre				
Educación				
Medio Ambiente				
Actividades de organizaciones de fe				
Asistencia medica				
Ayudar a personas de avanzada edad				
Desamparados (personas sin casa)				
Vivienda				
Derechos humanos				

La comunidad/los asuntos globales	Trabajo	Voluntario	Aprendizaje	Ningún Interés
Ayuda internacional				
Los asuntos de las minorías				
Trabajo en el vecindario				
La pobreza				
Trabajo público de la política				
Asuntos de mujeres				
La juventud				

14. Si hay otra área en la que usted tiene un ALTO INTERES A LLEGAR DE ESTAR PERSONALMENTE INVOLUCRADO por favor aclare aquí _____

15. ¿Cuántos años tienes? ☐ 50-54 ☐ 55-50 ☐ 60-64 ☐ 65-70 ☐ Mas de 70

16. Es usted: ☐ Mujer ☐ Hombre

17. Es usted: ☐ Soltero(a) ☐ Casado(a) ☐ Separado(a) ☐ Viviendo con mi pareja ☐ Divorciado ☐ Viudo

18. ¿En qué condado vive? _____

19. ¿Cuál de los siguientes lo describe mejor:

☐ Indio Americano ☐ Nativo de Hawai y otras islas del Pacífico ☐ Asiático ☐ Negro/Afro-Americano ☐ Blanco, no Hispano ☐ Hispano/Latino ☐ Como se identifica

usted: _____

En el 2006, ¿Cuales fueron los ingresos totales de su casa de todas las fuentes antes de impuestos?

☐ Menos que \$20,000 ☐ \$35,000 a \$55,000 ☐ \$75,000 a \$100,000
☐ \$20,000 a \$35,000 ☐ \$55,000 a \$75,000 ☐ Más de \$100,000

20. ¿Es usted el principal proveedor de ingresos en su casa? ☐ Sí ☐ No

21. ¿Actualmente, tiene algún de los siguientes beneficios de salud?

22. ☐ Medicaid ☐ Medicare ☐ Trabajo de medio tiempo ☐ Seguro de Salud Privado
☐ Sin seguros

23. ¿Recibe usted los beneficios del Seguro Social o una pensión actualmente? ☐ Sí ☐ No

24. ¿Actualmente, es usted responsable de cuidar un miembro de la familia o amigo que está envejeciendo? ☐ Sí ☐ No

25. ¿Actualmente es usted responsable de cuidar un niño menor de 18 años? ☐ Sí ☐ No

26. ¿Por cuánto tiempo has vivido en los Estados Unidos?

☐ Toda mi vida ☐ Menos de 10 años ☐ 11-25 años ☐ 26-50 años

27. ¿Cuándo usted piensa acerca de la próxima etapa de su vida, sabe usted donde encontrar lo que le gustaría hacer (ya sea un trabajo, ser voluntario, una oportunidad de servicio, o una experiencia educativa)? ☐ Sí ☐ No

28. Si es así, por favor sea específico. _____

29. ¿Cómo planea contribuir a asuntos o causas en los que usted tenga interés?

- | | |
|--|--|
| <input type="checkbox"/> Ser voluntario | <input type="checkbox"/> Entrar en grupos que abogan por ciertas causas |
| <input type="checkbox"/> Trabajar para una organización no lucrativa | <input type="checkbox"/> Contribuir con dinero a causas, u organizaciones en los que tengo interés |
| | <input type="checkbox"/> Yo no planeo contribuir |

30. La jubilación significa cosas diferentes para cada persona. ¿Qué es lo que a USTED le gustaría hacer durante la próxima etapa de su vida?

31. ¿Cuál es su afiliación religiosa?

- | | | |
|------------------------------------|-----------------------------------|---|
| <input type="checkbox"/> Budista | <input type="checkbox"/> Hindú | <input type="checkbox"/> Protestante |
| <input type="checkbox"/> Católico | <input type="checkbox"/> Judío | <input type="checkbox"/> Espiritual/no afiliado |
| <input type="checkbox"/> Cristiano | <input type="checkbox"/> Musulmán | <input type="checkbox"/> Otro (favor aclarar) _____ |

¡Gracias por completar la encuesta!

**Colorado Boomers Leading Change
Education, Training and Lifelong Learning Opportunities Survey**

The Colorado ***Boomers Leading Change*** initiative is conducting a comprehensive community assessment to identify the needs and opportunities for adults ages 55 to 65 (referred to as boomers) to remain engaged in community life through employment, service and lifelong learning. You were identified as an organization that could help us with this effort. The purpose of this survey is to solicit your input on the ***Education, Training and Lifelong Learning Opportunities*** for boomers in the Denver metro area. Your responses will be combined with those of other organizations and will be kept confidential. Thank you for taking the time to answer the questions below.

1. Type of Organization

- | | |
|---|--|
| <input type="checkbox"/> Community college | <input type="checkbox"/> College or university |
| <input type="checkbox"/> Nonprofit | <input type="checkbox"/> Trade school |
| <input type="checkbox"/> Job training program | <input type="checkbox"/> Other _____ |

2. What is your Position/Title: _____

3. How many students or participants do you serve in your organization? _____

4. How many of your students or participants are boomers (ages 55-65)? _____

5. Has boomer participation increased in your organization in the PAST five years?

- ☐ Yes ☐ No ☐ Don't know

6. If so, by how much approximately? _____ percent

7. Do you expect boomer participation to increase in your organization in the NEXT five years?

- ☐ Yes ☐ No ☐ Don't know

8. What percentage of the boomers that you serve are seeking:

- Education or training to maintain or augment current job skills _____ percent
- Education or training to prepare for a second or new career _____ percent
- To learn for the love of learning _____ percent
- An opportunity to socialize and network with others _____ percent
- To learn for other reasons (please explain) _____ percent
- An opportunity for self improvement _____ percent
- To teach others what they know _____ percent

9. For those boomers seeking education or training to **prepare for a new career**, what fields are they most interested in pursuing? (Check all that apply)

10.

- | | |
|---|---|
| <input type="checkbox"/> Education | <input type="checkbox"/> Social services |
| <input type="checkbox"/> Health care | <input type="checkbox"/> Business (i.e., finance, management, company start-up) |
| <input type="checkbox"/> Arts and culture | <input type="checkbox"/> Nonprofit management (i.e., civic work) |
| <input type="checkbox"/> Government | <input type="checkbox"/> Marketable trade (carpentry, car repair, dress making) |
| <input type="checkbox"/> Religions vocation | <input type="checkbox"/> Communication (i.e., media and public relations) |
| <input type="checkbox"/> Sports and fitness | <input type="checkbox"/> Carpentry |
| <input type="checkbox"/> Technology | <input type="checkbox"/> Other _____ |

11. What types of learning opportunities do you offer to boomers? (Check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Courses for college credit | <input type="checkbox"/> Distance learning (i.e., online courses or training) |
| <input type="checkbox"/> Courses for non-college credit | <input type="checkbox"/> Certificate programs |
| <input type="checkbox"/> Workshops/seminars | <input type="checkbox"/> Social events (i.e., informal gatherings) |
| <input type="checkbox"/> Lectures/symposium | <input type="checkbox"/> Enrichment and lifelong learning |
| <input type="checkbox"/> Professional development | <input type="checkbox"/> Travel experiences |
| <input type="checkbox"/> Job training | <input type="checkbox"/> Other _____ |

12. What opportunities do you provide boomers to teach/instruct others about what they know?

13. What STRATEGIES do you currently use to engage students or participants age 55-65? (Check all that apply)

- ☐ Conduct outreach to adults still in the workforce
- ☐ Conduct marketing/advertising campaigns
- ☐ Customize recruitment strategies for engaging participants from diverse populations
- ☐ Develop key partnerships in the community to share resources, access participants, etc.
- ☐ Offer a wide range of learning opportunities (i.e., different ways to learn)
- ☐ Offer flexible scheduling
- ☐ Offer small class sizes
- ☐ Offer centralized intake services
- ☐ Offer individualized placement services
- ☐ Offer career or life-planning counseling
- ☐ Provide alternative admission standards (i.e., work experiences counting as credit)
- ☐ Provide alternative cost structures for non-traditional students
- ☐ Offer class locations that are easy to access
- ☐ Offer parking or transportation costs

- ☐ Offer learning topics that are stimulating and appealing to the “new” active, healthier boomer
- ☐ Design learning opportunities that consider how boomers learn and how they learn best
- ☐ Provide opportunities for hands-on and active participation (versus just conceptual learning)
- ☐ Offer informal opportunities for boomers to socialize and network (i.e., social/cultural events)
- ☐ Offer a relaxed and fun learning environment
- ☐ Offer classes about issues or times that resonate with boomers’ experiences
- ☐ Create opportunities for boomers to teach what they know
- ☐ Involved boomers in designing classes or curriculum
- ☐ Offer programs for multi-generational learning
- ☐ Offer sliding fee scale or discounts
- ☐ Offer boomer-only opportunities

Please describe any other strategies you currently use to engage students or participants age 55-65:

Please describe any trends you have seen in students age 55-65 (i.e., women returning to school, boomers wanting education for career change, etc.):

14. Based on your organization’s experience, what are the BENEFITS of having students or participants age 55-65? (Rank order the top three, with 1 as most important)

- | | |
|---|---|
| <input type="checkbox"/> Peer support and connectedness
<input type="checkbox"/> Enthusiasm and energy
<input type="checkbox"/> Mentoring of younger people | <input type="checkbox"/> Impact to the well-being of the community
<input type="checkbox"/> Benefits to boomers themselves (i.e., improved quality of life, sense of purpose)
<input type="checkbox"/> Desire for continued growth and learning |
|---|---|

Please describe any other benefits that you have experienced in having students or participants age 55-65:

15. What CHALLENGES have you experienced in engaging students or participants age 55-65? (Rank order the top four, with 1 as most important)

- ☐ Difficulty designing activities or topics geared toward boomers
- ☐ Lack the resources to provide the learning opportunities that boomers need
- ☐ Our staff and/or instructors do not have experience with the boomer demographic
- ☐ Demands of caregiving and/or family obligations cause participants to quit or cut back
- ☐ Personal health problems cause participants to quit or cut back
- ☐ Lack of social support or connectedness cause participants to quit or cut back
- ☐ The negative image/perception associated with teaching “older” learners

Please describe any other challenges that you have faced in engaging students or participants age 55-65:

16. What types of changes in your infrastructure and/or policies need to happen in order to better recruit and retain students or participants age 55-65?

17. How do you define “learning or training success” in your organization?

18. Please describe any models or programs in the Denver metro area that you know of that have experienced success in engaging boomers via education, training or lifelong learning?

Are you willing to be contacted by the Colorado Boomers Leading Change Initiative to participate in an interview or focus group?

☐ Yes ☐ No

If Yes: Name: _____

Name of organization: _____

E-mail: _____

Phone: _____

Best way to reach you: ☐ Phone ☐ E-mail

If by phone, what is the best time to contact you? _____

If you are interested in receiving a link to the electronic report of the results of this survey, please give us your e-mail address: _____

Thank you for completing the survey!

Colorado Boomers Leading Change Employment Opportunities Survey

The Colorado **Boomers Leading Change** initiative is conducting a comprehensive community assessment to identify the needs and opportunities for adults ages 55 to 65 (referred to as boomers) to remain engaged in community life through employment, service and lifelong learning. You were identified as an organization that could help us with this effort. The purpose of this survey is to solicit your input on the ***Employment Opportunities*** for boomers in the Denver metro area. Your responses will be combined with those of other organizations and will be kept confidential. Thank you for taking the time to answer the questions below.

1. Type of Organization:

- ☐ For profit
- ☐ Nonprofit
- ☐ Government agency
- ☐ Other _____

2. What is your primary industry?

- | | |
|--|--|
| <input type="checkbox"/> Accommodation and food service | <input type="checkbox"/> Arts, entertainment & recreation |
| <input type="checkbox"/> Administrative & support & waste management | <input type="checkbox"/> Construction |
| <input type="checkbox"/> Agriculture, forestry, fishing & hunting | <input type="checkbox"/> Educational services |
| <input type="checkbox"/> Finance and insurance | <input type="checkbox"/> Health care and social assistance |
| <input type="checkbox"/> Information | <input type="checkbox"/> Management of companies and enterprises |
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Mining |
| <input type="checkbox"/> Other services (except public admin) | <input type="checkbox"/> Professional, scientific and technical services |
| <input type="checkbox"/> Retail trade | <input type="checkbox"/> Real estate, rental and leasing |
| <input type="checkbox"/> Retail trade | <input type="checkbox"/> Transportation and warehousing |
| <input type="checkbox"/> Utilities | <input type="checkbox"/> Wholesale trade |

3. In what county is your organization located?

- | | |
|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> Adams | <input type="checkbox"/> Douglas |
| <input type="checkbox"/> Arapahoe | <input type="checkbox"/> Jefferson |
| <input type="checkbox"/> Broomfield | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Denver | |

4. Your Position/Title: _____

5. How many employees do you have in your organization?

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> Less than 5 | <input type="checkbox"/> 51-75 |
| <input type="checkbox"/> 6-10 | <input type="checkbox"/> 76-100 |
| <input type="checkbox"/> 11-20 | <input type="checkbox"/> 101-200 |
| <input type="checkbox"/> 21-30 | <input type="checkbox"/> 201-500 |
| <input type="checkbox"/> 31-50 | <input type="checkbox"/> More than 500 |

6. How many of your employees are Boomers (ages 55-65)? (If “none” is selected, the survey ends)

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> None | <input type="checkbox"/> 51-75 |
| <input type="checkbox"/> Less than 5 | <input type="checkbox"/> 76-100 |
| <input type="checkbox"/> 6-10 | <input type="checkbox"/> 101-200 |
| <input type="checkbox"/> 11-20 | <input type="checkbox"/> 201-500 |
| <input type="checkbox"/> 21-30 | <input type="checkbox"/> More than 500 |
| <input type="checkbox"/> 31-50 | |

7. In 2006, approximately what percent of your new hires were ages 55-65?

- | | |
|--|----------------------------------|
| <input type="checkbox"/> 0% | <input type="checkbox"/> 40-50% |
| <input type="checkbox"/> Less than 10% | <input type="checkbox"/> 50-60% |
| <input type="checkbox"/> 11-20% | <input type="checkbox"/> 60-70% |
| <input type="checkbox"/> 20-30% | <input type="checkbox"/> 70-80% |
| <input type="checkbox"/> 30-40% | <input type="checkbox"/> 90-100% |

8. Is there a trend in boomer applicants toward:

- ☐ More female hires ☐ More male hires ☐ Equal numbers of both

9. What STRATEGIES do you currently offer to employees? (Check all that apply)

- ☐ Provide a pension plan
- ☐ Offer health care benefits
- ☐ Offer retiree benefits (i.e., benefits for retired employees)
- ☐ Offer phased retirement programs (i.e., employees withdraw from the work force gradually)
- ☐ Offer reward programs (i.e., recognition of experience)
- ☐ Offer part-time employment
- ☐ Offer flexible work schedules (i.e., hours, shifts, work days)
- ☐ Provide job sharing opportunities
- ☐ Offer seasonal and/or temporary work
- ☐ Offer telecommuting opportunities (i.e., working from home)
- ☐ Offer workplace accommodations
- ☐ Provide training or education opportunities

- ☐ Offer assistance with retirement or financial planning
- ☐ Offer “bridge jobs” to ease the transition from work to retirement
- ☐ Provide opportunities to mentor and/or train younger employees
- ☐ Free transportation
- ☐ Policies against age discrimination
- ☐ Provide a positive working environment/culture for a multigenerational work force
- ☐ Provide meaningful, interesting and challenging work assignments
- ☐ Cafeteria (flexible spending) plan
- ☐ Prescription drug plans
- ☐ We do not use any specific strategies

Please describe any other strategies you currently use to hire and/or retain employees age 55-65:

10. Based on your organization’s experience, what are the BENEFITS of having employees age 55-65? (Check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Not enough experience to answer | <input type="checkbox"/> Focused |
| <input type="checkbox"/> Greater knowledge and skills | <input type="checkbox"/> Role model |
| <input type="checkbox"/> Job-related experience | <input type="checkbox"/> Stability (i.e., higher retention rates) |
| <input type="checkbox"/> Mentoring of younger people | <input type="checkbox"/> Commitment to quality work |
| <input type="checkbox"/> Leadership abilities | <input type="checkbox"/> Reliable |
| <input type="checkbox"/> Loyalty to organization | <input type="checkbox"/> Exhibit flexibility and innovation in work |
| <input type="checkbox"/> Desire to do meaningful work | <input type="checkbox"/> Relate well to our clients/customers/colleagues |
| <input type="checkbox"/> Ability to deal with change | <input type="checkbox"/> Well-connected in community/industry |

Please describe any other benefits that you have experienced in having employees age 55-65:

11. What are the CHALLENGES with employees age 55-65? (Check all that apply)

- ☐ Not enough experience to answer
- ☐ Providing the flexible work schedules
- ☐ Providing stimulating work assignments
- ☐ Providing the adequate training and/or learning opportunities
- ☐ Demands of caregiving and/or family obligations cause employees to quit or cut back
- ☐ Personal health problems cause employees to quit or cut back
- ☐ Higher health care costs and/or compensation packages
- ☐ Difficulty accepting supervision from younger workers
- ☐ The negative image/perception associated with hiring “older workers” is an impediment

- ☐ Multigenerational tension
- ☐ Overqualified for position
- ☐ Inability to physically and/or mentally keep pace with workplace culture

12. Has your organization been challenged in hiring boomers by laws and/or policies regarding pension or Social Security benefits that restrict employees ability to work?

- ☐ Yes ☐ No ☐ Don't know

Please describe any other challenges that you have faced in hiring and/or retaining employees age 55-65:

Please describe any trends you have seen in hiring and/or retaining employees age 55-65 (i.e., women returning to the work force, boomers changing careers, etc.):

I believe that my organization:

- 13. Is actively engaged in recruitment and retention strategies for workers age 55-65
- 14. Encourages employees age 55-65 to stay on the job
- 15. Is challenged by an aging work force
- 16. Prepares employees who plan to retire to explore post-retirement options such as service, learning or other work
- 17. Has the infrastructure and the policies to attract and retain boomer employees
- 18. Recognizes that workers age 55-65 represent a solution to staffing challenges that may lie ahead
- 19. Is poised to respond to future labor shortages and the potential loss of experienced talent in key roles

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

20. Do you know of any models or programs in the Denver metro area that have experienced success in engaging boomers in meaningful employment? (Please list)

21. Are you willing to be contacted by the Colorado Boomers Leading Change Initiative to participate in an interview or focus group?

☐ Yes ☐ No

If Yes: Name: _____

Name of organization: _____

E-mail: _____

Phone: _____

Best way to reach you: ☐ Phone ☐ E-mail

If by phone, what is the best time to contact you? _____

22. If you are interested in receiving a link to the electronic report of the results of this survey, please give us your e-mail address: _____

Thank you for completing the survey!

Colorado Boomers Leading Change
Service, Volunteering and Civic Engagement Opportunities Survey

The Colorado **Boomers Leading Change** initiative is conducting a comprehensive community assessment to identify the needs and opportunities for adults ages 55 to 65 (referred to as boomers) to remain engaged in community life through employment, service and lifelong learning. You were identified as an organization that could help us with this effort. The purpose of this survey is to solicit your input on the ***Service, Volunteering and Civic Engagement Opportunities*** for boomers in the Denver metro area. Your responses will be combined with those of other organizations and will be kept confidential. Thank you for taking the time to answer the questions below.

1. Type of Organization:

- | | |
|--|---|
| <input type="checkbox"/> For profit | <input type="checkbox"/> Housing |
| <input type="checkbox"/> Nonprofit | <input type="checkbox"/> Homelessness |
| <input type="checkbox"/> Government agency | <input type="checkbox"/> Community building |
| <input type="checkbox"/> Youth mentoring | <input type="checkbox"/> Environment |
| <input type="checkbox"/> Poverty | <input type="checkbox"/> Other _____ |

2. Is your organization faith-based? ☐ Yes ☐ No

3. What is the main focus of your group?

- | | |
|---|--|
| <input type="checkbox"/> Health care | <input type="checkbox"/> Labor union |
| <input type="checkbox"/> Aging | <input type="checkbox"/> Associations (business, profession, alumni) |
| <input type="checkbox"/> Education | <input type="checkbox"/> Education institution |
| <input type="checkbox"/> Child and family development | <input type="checkbox"/> Other _____ |

4. Does your organization serve a particular demographic group? (Check all that apply)

- ☐ Male
- ☐ Female
- ☐ Religious group: _____
- ☐ Ethnic or cultural group: _____
- ☐ Age group: _____
- ☐ GLBT
- ☐ Political party: _____
- ☐ Health status: _____
- ☐ Other: _____

5. In what county is your organization located?

- | | |
|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> Adams | <input type="checkbox"/> Douglas |
| <input type="checkbox"/> Arapahoe | <input type="checkbox"/> Jefferson |
| <input type="checkbox"/> Broomfield | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Denver | |

6. Your Position/Title: _____

7. How many volunteers do you have in your organization? (If none, survey ends)

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> None | <input type="checkbox"/> 51-75 |
| <input type="checkbox"/> Less than 5 | <input type="checkbox"/> 76-100 |
| <input type="checkbox"/> 6-10 | <input type="checkbox"/> 101-200 |
| <input type="checkbox"/> 11-20 | <input type="checkbox"/> 201-500 |
| <input type="checkbox"/> 21-30 | <input type="checkbox"/> More than 500 |
| <input type="checkbox"/> 31-50 | |

8. What percentage of your volunteers are boomers (ages 55-65)?

- | | |
|--|----------------------------------|
| <input type="checkbox"/> 0% | <input type="checkbox"/> 40-50% |
| <input type="checkbox"/> Less than 10% | <input type="checkbox"/> 50-60% |
| <input type="checkbox"/> 11-20% | <input type="checkbox"/> 60-70% |
| <input type="checkbox"/> 20-30% | <input type="checkbox"/> 70-80% |
| <input type="checkbox"/> 30-40% | <input type="checkbox"/> 90-100% |

9. Are your 55-65 volunteers mostly: ☐ Women ☐ Men ☐ Same number

10. Do you have a dedicated volunteer manager or coordinator? ☐ Yes ☐ No

11. What STRATEGIES do you use to recruit and/or retain volunteers? (Check all that apply)

- ☐ Use staff or volunteer peer networks for recruitment (i.e., word of mouth, peer recruitment)
- ☐ Conduct outreach to adults still in the work force
- ☐ Conduct marketing/advertising campaigns
- ☐ Customize recruitment strategies for engaging volunteers from diverse populations
- ☐ Develop key partnerships in the community to share resources, access volunteers, etc.
- ☐ Offer a wide range of volunteering opportunities (i.e., different ways to get involved)
- ☐ Offer flexible scheduling
- ☐ Allow for different levels of commitment (i.e., from one-time help to episodic to long-term)
- ☐ Emphasize social opportunities in volunteering
- ☐ Involve volunteers in leadership and civic engagement roles (i.e., committee and/or board, program development, marketing, recruitment, fundraising, etc.)

- ☐ Match individuals' interests, skills and experience with volunteering activity
- ☐ Provide an open and supportive environment for volunteers
- ☐ Create advancement opportunities and a volunteer "career ladder"
- ☐ Provide opportunities for paid work
- ☐ Offer health benefits
- ☐ Provide training or education opportunities
- ☐ Provide adequate resources (i.e., technology, etc.)
- ☐ Provide meals or non-cash gifts as incentives
- ☐ Provide opportunities for recognition
- ☐ Cultivate volunteer network through current volunteers
- ☐ We do not use any specific strategies

Please describe any other strategies you currently use to recruit and/or retain volunteers age 55-65:

Please describe any trends you have seen in volunteers age 55-65 (i.e., more women, types of work that boomers want to do, etc.) :

12. Based on your organization's experience, what are the BENEFITS of using volunteers age 55-65? (Rank order the top five, with 1 as most important)

- | | |
|--|--|
| <input type="checkbox"/> Greater knowledge and skills | <input type="checkbox"/> Productivity |
| <input type="checkbox"/> Experience/expertise | <input type="checkbox"/> Work ethic |
| <input type="checkbox"/> Mentoring of younger people | <input type="checkbox"/> Flexibility/more time to offer |
| <input type="checkbox"/> Leadership abilities | <input type="checkbox"/> Enthusiasm |
| <input type="checkbox"/> Loyalty to organization | <input type="checkbox"/> Impact to the well-being of the community |
| <input type="checkbox"/> Peer support and connectedness | <input type="checkbox"/> More likely to donate money as well as time |
| <input type="checkbox"/> Benefits to boomers themselves (i.e., improved quality of life, sense of purpose) | |

Please describe any other benefits that you have experienced in using volunteers age 55-65:

13. What CHALLENGES have you experienced in recruiting and/or retaining volunteers age 55-65? (Rank order the top five, with 1 as most important)

- ☐ Boomers are a difficult demographic to find and recruit
- ☐ Boomers' lack of time
- ☐ The negative image/perception of "volunteering" is an impediment to overcome
- ☐ Less civic-minded than previous generation (i.e., their parents' generation)

- ☐ Creating flexible opportunities
- ☐ Tension between paid and volunteer staff
- ☐ Demands of caregiving cause volunteers to quit or cut back
- ☐ Personal health problems cause volunteers to quit or cut back
- ☐ Financial demands cause volunteers to quit or cut back
- ☐ Lack of social support or connectedness cause volunteers to quit or cut back
- ☐ Volunteers new to nonprofit world just don't "get it"
- ☐ Our organization is not prepared to integrate all the skills and expertise that boomers have to offer

Please describe any other challenges that you have faced in recruiting and/or retaining volunteers age 55-65:

--

I believe that my organization:

14. Is motivated to engage boomer volunteers

15. Has the infrastructure and the policies to attract and retain boomer volunteers

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

16. Do you know of any models or programs in the Denver metro area that you know of that have experienced success in engaging boomers in service to their communities? (Please list)

17. Are you willing to be contacted by the Colorado Boomers Leading Change Initiative to participate in an interview or focus group?

☐ Yes ☐ No

If Yes: Name: _____

Name of organization: _____

E-mail: _____

Phone: _____

Best way to reach you: ☐ Phone ☐ E-mail

If by phone, what is the best time to contact you? _____

18. If you are interested in receiving a link to the electronic report of the results of this survey, please give us your e-mail address: _____

Thank you for completing the survey!

Results of Survey USA Market Research Study 3/12/2007

Geography Surveyed: Denver DMA

Data Collected: 03/09/2007 - 03/10/2007

Release Date: 03/12/2007 09:25 ET

Sponsor: KUSA-TV Denver

Asked of 250 Adults aged 55-65

Margin of Sampling Error for this question = $\pm 6.3\%$

1. If you are employed...

44% Full-time
8% Part-time
10% Self-employed
34% Retired
3% Everyone Else

2. How interested are you in changing your career path, whether that means changing the type of work you do, changing the hours you work, or doing volunteer work? Very interested? Somewhat interested? Not very interested? Or not at all interested

9% Very
19% Somewhat
30% Not Very
41% Not At All
0% Not Sure

3. What one factor would be most important in deciding whether or not to change your career path? A flexible work schedule? The ability to work part-time? Salary? Health care benefits? Retirement benefits? Training or educational opportunities? Staying involved with people? Doing meaningful work? Being a mentor to young people? Or something else?

8% Flexible Schedule
14% Part-time Work
19% Salary
14% Health Benefits
10% Retirement Benefits
3% Training Or Education
6% Staying Involved
4% Meaningful Work
5% Being a Mentor
13% Other
4% Not Sure

4. How interested would you be in volunteering to help people in the community?

18% Very

36% Somewhat
26% Not Very
17% Not At All
3% Not Sure

5. Asked of 134 who would be interested in volunteer work
Margin of Sampling Error for this question = $\pm 8.6\%$

In which one of the following areas would you be most interested in volunteering or working? Older adults? Children? The homeless? Poverty? Health Care? Education? International Aid? The environment? Arts and culture? Human rights? Or something else?

15% Older Adults
23% Children
6% Homeless
3% Poverty
10% Health Care
9% Education
4% International Aid
10% Environment
6% Arts And Culture
3% Human Rights
11% Other

6. How interested would you be going to school or taking a class to get additional job training?

16% Very
16% Somewhat
23% Not Very
44% Not At All
1% Not Sure

7. Asked of 80 who would be interested in school or classes
Margin of Sampling Error for this question = $\pm 11.2\%$

What would most motivate you to get additional education or job training? To maintain your current skills? You enjoy learning new things? The opportunity to socialize? To prepare for a new career? To increase your salary? Or something else?

8% Maintain Skills
53% Enjoy Learning
11% Opportunity To Socialize
12% Prepare For a New Career
11% Increase Salary
5% Other
0% Not Sure

Appendix C

Focus Group and Interview Protocols



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Focus Group Protocol and Questions

**Rose Community Foundation (RCF) Boomers Leading Change
Discussion Group Questions: (group description)**

Date_____ Location_____ Facilitator_____

I. Introductions

Facilitator/s should introduce herself/himself/themselves by name, what they do, what their role is, and talk briefly about JVA. For example, *My name is Robin Leake. I am an evaluator at JVA Consulting, a private consulting firm that helps nonprofit organizations, foundations, school districts and government agencies achieve their goals through a comprehensive approach that includes strategic and business planning, staff and board training, management consulting, fundraising, grantwriting, research, and program evaluation. I am working with the Colorado Boomers Leading Change project to gather information from Boomers about trends and issues facing adults aged 55-65 in the Denver-metro area in the areas of work, service and learning. You were selected because you are between the ages of 55-65 and represent your community.*

II. Explain Purpose

Put on Flip Chart: Boomers Leading Change; with the 3 circles: One circle = Boomers Interests/Desires; 2nd circle write Employment, service, learning opportunities; 3rd circle write Community needs; color in the intersecting section. *JVA is assessing each of these circles with the goal to identify the intersection-, which are community initiatives. Today we'll be discussing issues and trends for Boomers age 55-65 in the Denver Metro area and needs and opportunities for Boomers entering the next phase of their lives. There are no right or wrong answers, just differing views. Please feel free to share your point of view even if it differs from others. **Everyone's** views matter to us.*

Put on flip chart: Community Needs Assessment

1. Comprehensive demographic overview
2. Literature review
3. Web-based surveys: employment, service, learning
4. "Boomer" survey
5. Key informant interviews and focus groups

Explain that the community needs assessment includes all of these components and that the purpose of the focus group is to dig deeper to learn more about these issues.

III. Explain Confidentiality

All of your responses will be confidential. We are conducting a series of discussion groups in the community and the responses will be aggregated by themes in a final report to the community foundations sponsoring this project. No names or identifiers will be associated with individual

responses. (If audiotaping) We would like to audiotape this discussion group so we can be sure to accurately capture your responses. Do we have your permission to record this discussion? Please be assured all recordings and transcriptions will be maintained in a secure file at JVA and not shared with anyone else. We would also like to ask that you maintain the confidentiality of the discussion as well, and agree that what is said in the room stays in the room.

IV. Ground Rules

Before you introduce yourselves I would like to go over some ground rules first so everyone will feel comfortable sharing their views. Go over ground rules (this will last one to one and a half hours, discussion questions will sometimes be round-robin but mostly open discussion, facilitator may call on individuals to respond—do not have to if don't feel comfortable, turn off cell phones, give everyone a chance to talk, do not talk over one another, ask if there are any others??)

FOCUS GROUP QUESTIONS

Write this statement on flip chart...

1. Someone recently said about our generation: "In the 60s, they changed the world; in their 60s, they may do it again."

Ask each person to introduce him or herself and respond to the quote.

What do you think about that statement? How does it resonate with you?

2. Based on your own work/volunteer/community and/or life experience, what are specific needs and gaps that you see that retiring boomers might fill? (WE MIGHT GIVE AN EXAMPLE HERE TO GET THEM GOING)
3. A number of people across the country are viewing the baby boomer generation as a potential tremendous resource in addressing community and global needs. What community/global needs do you see out there that you think boomers could have a critical role in addressing in their next phase of life? (Note: This question comes up often as #2? But can be asked as a more global question later)
 - What might that look like?
4. Do you think boomers will do something as individuals, or take collective action, like in the 60s...or both? What would this look like?
5. As you think of the next phase of your own life, in what ways do you visualize yourself involved in work, volunteering and/or learning something new?
 - Do you know what you want to do next?
 - What is motivating this decision?
 - How would you go about investigating and pursuing this next "thing"/stage in your life?
6. If you were interested in making changes in your life, would you take advantage of a specifically designed resource and linkage/matching service to help you identify these interests and access opportunities? (E.g., like a placement service, similar to a concierge service, or college-counseling program?)
 - What features would you want it to have?
 - What would be critical to its success?
 - What would be the challenges?
7. What, if any, models or programs in the Denver metro area do you know of that have had success in engaging boomers in meaningful community service, employment or continuing education?
8. What are some of the most interesting ideas you've heard from friends or others, or read about, about what boomers are going to do next in their lives?

ENDING QUESTION: You've shared a lot of interesting information—is there anything else you'd like to share about this topic, or a question that you think we should have asked but didn't?

ENDING STATEMENT: HAND OUT BUSINESS CARDS TO EACH PARTICIPANT—If you leave here and think of something else, please don't hesitate to call or email us



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Interview Questionnaire Protocol Boomers Leading Change

Name of Interviewee: _____

Phone (contact number): _____ Date: _____

Address/email: _____ RCF CAC/Referral: Y N

Interview focus/notes (Why is this person being interviewed?
work/study/learning/general boomer/politician/other): _____

"Thank you for taking the time to be interviewed. As part of our research on the Boomers Leading Change! Initiative through Rose Community Foundation, we are conducting interviews with individuals to learn more about trends and issues facing adults aged 55-65 in the Denver-metro area in the areas of work, service and learning. I'd like to ask you a few questions about this issue."

(If you are interviewing people who have attended the first RCF CAC meeting, this intro will be different- you are interviewing them to follow up on the initial meeting to dig deeper into the issues facing Boomers.)

1. What trends or issues are you seeing as Boomers (people 55-65) are beginning to, or thinking about retiring?
2. In your area (work/service/learning/general boomer-hood) what opportunities are out there for boomers? What are the hurdles in your area (e.g. bureaucracy? Systems don't know how to handle or change to meet boomers' needs.)
3. Do you know what you want to do next? How would you go about finding out about pursuing your next "thing."?
4. Do you think boomers would take advantage of a "concierge" service to help them identify their interests and how to access opportunities? (E.g. like a placement service, similar to a dating service, or college-counseling program?) Would you use one? What would be critical to its success?
5. What do you think would be important initiatives or programs for boomers to engage in our community?

E.g. health, education, building next generation (i.e., mentoring).
Entrepreneurship, nonprofit leadership,

6. Do you know of any specific examples of initiatives in the metro area?
7. One of the big challenges is how to “brand” this effort. Lots of different terms such as “experienced adults” “redefining retirement” “next Generation” are used.....None have stuck. Any ideas?
8. Anything else you want to add?

Thanks very much for your time.

Appendix D

Community Advisory Committee

Community Advisory Committee Members

Steering Committee members represent selected trustees, committee members, and donors of Rose Community Foundation and also serve as *ex officio* members of the Community Advisory Committee.

Steering Committee Members and Affiliations:

Ms. Raydean Acevado	RMCI
Mr. Roy Alexander	Colorado Housing & Finance Authority
Mr. Dave Boyles	Retired Banker
Ms. Nea Brown	Holme, Roberts & Owen, LLP
Mr. Barry Curtiss-Lusher	Nexus Resources Inc.
Ms. Stephanie Foote	LAVAL Strategic Resources, LLC
Ms. Jean Galloway	The Galloway Group
Ms. Arlene Hirschfeld	Rose Community Foundation Board of Trustees
Ms. Deborah Lamm	Denver Children's Home
Ms. Sharon Larson	U.S. Administration on Aging
Ms. Barbara Mellman Davis	Retired Investment Executive
Mr. Neil Oberfeld	Isaacson Rosenbaum P.C.
Sister Lydia Peña	Regis University
Dr. Dean Prina, M.D.	Partners in Pediatrics
Ms. Nancy Reichman	University of Denver
Dr. Stephan Shogan, M.D.	Colorado Neurosurgery Associates

Community Advisory Committee Members and Affiliations:

Ms. Katherine Archuleta	Mayor's Office for the City and County of Denver
Ms. Jane Barnes	St. Anthony Hospital-Centura Health
Mr. John Baron	GBSM, Inc.
Mr. Joe Barrows	UBS Financial Services
Ms. Virginia Berkeley	Colorado Business Bank
Ms. Michele Bloom	The Women's College, University of Denver
Ms. Sue Bozinovski	Denver Regional Council of Governments
Ms. Deborah Brackney	Mountain States Employers Council
Mr. David Burgess	CHARG Resource Center
Ms. Carmen Carillo	Mi Casa Resource Center for Women
Dr. Katherine Cattanach, Ph.D.	Retired Investment Executive
Dr. Jack Cochran	Colorado Permanente Medical Group
Ms. Sue Damour	Planned Parenthood of the Rocky Mountains
Ms. Linda Dee	Retired, Volunteers of America
Ms. Lucille Echohawk	Casey Family Programs
Rabbi Steven Foster	Congregation Emanuel
Ms. Nita Gonzales	Escuela Tlatelolco
Mr. Pat Gourley	Denver Health
Ms. Lucia Guzman	City and County of Denver
Mr. Wayne Hutchens	University of Colorado Foundation
Ms. Beverly Ingle	Colorado Education Association
Dr. Sara Jarrett, Ed.D.	Regis University
Ms. Sue Kenney	Project Wise
Ms. Gail Klapper	Colorado Forum
Ms. Patti Klinge	Retired, Human Resources, AT&T Broadband
Ms. Sarah Krause	Northern Trust
Father Martin Lally	Queen of Peace Church
Dr. Toni Larson, Ph.D.	Independent Higher Education of Colorado
Ms. Martha Lee	Kellogg Fellows Alliance
Ms. Tamela Lee	Denver Office of Small Business Opportunity
Ms. Sharon Linhart	Linhart McClain Finlon Public Relations

Mr. Douglas Linkhart	Denver City Council
Mr. Jon Looney	AARP
Mr. Fidel "Butch" Montoya	Retired, Office of Safety, City and County of Denver
Mr. Zack Neumeyer	Sage Hospitality Resources LLC
Ms. Karen Newman	University of Denver, Daniels College of Business
Ms. Jackie Norris	Metro Volunteers
Ms. Jane Norton	Former Lieutenant Governor, State of Colorado
Ms. Yolanda Ortega	Metro State College of Denver
Ms. Cec Ortiz	Denver Office of Economic Development
Mr. Douglas Price	Benjamin Douglas Companies
Ms. Patricia Barela Rivera	U.S. Small Business Administration
Ms. Cleo Parker Robinson	Cleo Parker Robinson Dance
Mr. Michael Rosenzweig	Johns Manville
Ms. Marjorie Seawell	Registered Nurse
Mr. Kevin Seggelke	Food Bank of the Rockies
Ms. Sandra Shreve	League of Women Voters of Denver
Dr. Myron Sidon, D.D.S.	Retired Dentist
Mr. George Sparks	Denver Museum of Nature & Science
Dr. Pegi Touff, Ph.D.	Retired Psychologist
Ms. Caroline Turner	The AthenA Group LLC
Ms. Liz Ullman	ViCom
Ms. Kitryn "Kit" Williams	Kit Williams Photography
Mr. Bob Woolfolk	Agape Christian Church
Mr. Howard Zeppelin	Retired