

community**experience**
PARTNERSHIP
engaging older adults for civic good

An initiative for U.S. community foundations
from The Atlantic Philanthropies

Boomers and Beyond:

Is Our Community Ready to Tap Their Talents?

An Assessment of Community Readiness To Engage Experienced Adults for Civic Good

Grand Rapids Community Foundation

Grand Rapids, Michigan

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Grand Rapids

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Executive Summary

Consider...

- Between 2004 and 2014, the number of workers age 55 and older will grow at *nearly four times* the rate of the overall work force.
- These “leading edge” baby boomers are healthier, more educated, and better off financially than any previous generation.
- They are inclined to work in the so-called “retirement years.”
- Large numbers of them want to transition into work that is personally satisfying to them *and helps improve the quality of life in their communities.*

Is Grand Rapids ready to take advantage of the experience dividend that boomers present? With the support of a Community Experience Partnership grant from The Atlantic Philanthropies, Grand Rapids Community Foundation recently conducted a community assessment seeking answers to this question. The assessment draws on national research, local data analyses, and interviews with nonprofits focusing on lifelong learning, employment assistance and civic engagement opportunities for experienced adults.

Are we ready to tap boomers’ talents? Not really. Like most other communities, Kent County’s nonprofit sector faces significant challenges including:

- Many nonprofits lack awareness about demographic trends related to experienced adults and their desire to make a contribution to the community.
- Many nonprofits lack the capacity—in both human resources and volunteer management—to successfully engage experienced adults in productive roles.
- The encouraging news is that many local nonprofits express strong interest in strengthening their capacity to involve experienced adults.

The community assessment also indicates that:

- Most 50+ adults in Kent County get involved in their communities through non-age-specific programs. This means that effectively leveraging their resources and capabilities will require building the capacity of a broad range of nonprofit organizations, not just age-specific programs.
- Local organizations whose services focus on 50+ adults – lifelong learning, employment, and volunteer programs – could build their collective capacity to engage boomers by working together strategically in areas such as marketing and training.
- Local service opportunities offering experienced adults some form of compensation are extremely limited—although national research indicates that a significant number of older adults want and/or need paid work.

Research conducted during the community assessment suggests a number of promising strategies for creating community-wide capabilities for tapping the growing talent pool of experienced adults, including:

- Providing training for nonprofits on why and how to effectively engage experienced adults
- Developing a consortium of agencies focusing on sharing learning as they initiate efforts to engage experienced adults
- Involving nonprofits in developing a self-sustaining program to engage experienced adults to address specific community issues
- Providing resources to help experienced adults plan for “encore careers.”

Through this assessment, our community has gained significant understanding and insights into current thinking and best practices associated with engaging experienced adults in community work. The Atlantic Philanthropies’ Community Experience Partnership has provided access to data, resources and a learning community that would be hard to match working alone. The in-depth analysis of national and local resources, the relationships we have formed, and the “playbook” of strategies that resulted from this project give clear focus and direction for our efforts -- and create an impetus to act. Now is the time for organizations and individuals in our community to work together to translate this learning and these plans into reality.

Background

The Community Experience Partnership

The community assessment described in this report is a result of Grand Rapids Community Foundation's involvement in the Community Experience Partnership (CEP), a national initiative sponsored by The Atlantic Philanthropies. Atlantic, a private foundation that supports programs worldwide, is dedicated to bringing about lasting changes in the lives of disadvantaged and vulnerable people. Atlantic focuses on critical social problems related to aging, disadvantaged children and youth, population health, and reconciliation and human rights.

The Community Experience Partnership is aimed at expanding opportunities for experienced adults to become engaged as vital civic resources in their communities. "Tapping the tremendous potential of older adults to improve life for everyone in their communities is at the heart of this initiative," said Laura Robbins, head of the U.S. Aging Program for The Atlantic Philanthropies. "In communities across the U.S., the energy, skills and experience of people over sixty are ready to be unleashed. Imagine how much stronger communities will be when they choose to benefit from the time and talents of their most experienced citizens."

In September 2006 Grand Rapids Community Foundation was selected as one of only 30 community foundations in the U.S. to participate in phase one of the Community Experience Partnership, focusing on developing a knowledge base about local resources and strategies that offer opportunities to tap the talents of older adults. "The \$23,751 Atlantic Philanthropies grant has allowed the Community Foundation to take a closer look at how we might overcome outdated attitudes and capitalize on the skills and passions of experienced adults in our community—baby boomers and beyond," said Diana Sieger, Community Foundation President.

"The Community Experience Partnership is structured as a learning community, so our local research has been informed by opportunities to learn from the work of the other community partners. For example, we've learned that most communities need to do a lot of nonprofit capacity-building work in order to effectively engage experienced adults in addressing community problems."

Building on the Creating Community for a Lifetime Roadmap

If we can overcome our outdated, ageist views, we can learn to leverage the intellectual capital, talent, skills and commitment of older residents to help solve issues for all ages in our community. We can create a community that joins strength to strength to do the work that needs to be done. That's what we mean by creating community for a lifetime.

"Joining Strength to Strength:
Realizing the Potential of an Aging Community"¹

The assessment conducted by the Grand Rapids Community Foundation builds on the foundation laid by Creating Community for a Lifetime (CCFL), an ambitious, long-term initiative launched in 2004 by the Community Foundation and the Area Agency on Aging of Western Michigan. Through extensive research, information-gathering, and community planning, CCFL developed a vision of a "community for all ages":

We envision a Kent County in which:

- *All older adults have the opportunity to live to their fullest potential.*
- *The community works together to make Kent County a safe, comfortable and productive place for people of all ages and abilities to live.*

In the words of the national AdvantAge Initiative, Kent County seeks to create a community that addresses basic needs, optimizes physical and mental health and well-being, maximizes independence and promotes social and civic engagement of all of its residents.²

CCFL work groups studied Kent County data, reviewed current research and best practices and developed recommendations in eight issue areas guiding the community toward its vision of creating a community for all ages. The recommendations comprise a roadmap for Kent County.

Social and civic engagement of experienced adults is one of the eight issue areas for which recommendations were developed. The roadmap includes several goals aimed at assuring that “plentiful and diverse opportunities are available for older adults to remain fully engaged and make meaningful contributions to their communities.”³ These goals include increasing opportunities for experienced adults to be involved in meaningful learning, work, and volunteer activities. The community assessment advances the work in this issue area, identifying both significant barriers to civic engagement and key opportunities for supporting increased civic engagement in the experienced adult population.

Methodology

The community assessment employed three primary information-gathering strategies:

- The literature review identified current national research findings, including research on civic engagement in general and on current trends related to civic engagement of experienced adults.
- The quantitative data analyses⁴ focused on:
 - Demographic data, including the age distribution of the Kent County population; gender, poverty, education, employment, and homeownership data for adults 50+; and race/ethnicity patterns as well as economic, marital, and veteran status of those ages 60/65 and over
 - Workforce data
 - Community involvement data, including giving and volunteering
 - Well-being data including basic needs, health, and discrimination factors.
- Twenty-one interviews yielded the perspectives of representatives of local nonprofit organizations and programs in three areas: lifelong learning (4), employment assistance for experienced adults (4), and volunteer opportunities for experienced adults (13). Eighteen of the twenty-one interviews were conducted by telephone; three were in-person interviews. The interviews sought to elicit information in two key areas:
 - The current level/scope of civic engagement of experienced adults
 - The capacity of local nonprofit organizations to leverage the resources of a growing population of experienced adults.

Definitions

The community assessment intentionally uses broad definitions: We define our target population—experienced adults—as those 50 and over. We define civic engagement as involvement in community problem-solving—encompassing not only volunteer activity but also lifelong learning, as well as paid employment in public service.

Key Findings

Community Profile⁵

A Profound Age Shift

Kent County's 2005 population was 584,000. While adults 65+ comprised about 10 percent or 56,000 people, boomers made up nearly 20 percent or 108,000 people. Between 2000 and 2030, the number of 65+ residents in Kent County is expected to double as baby boomers enter traditional retirement age.

Kent County is becoming increasingly diverse, with significant growth in Black and Hispanic populations, both in the 65+ age group and among boomers.

1990 – 2000 Growth Rate	45-64	65+
Total population	+38%	+10%
White	+33%	+22%
Black	+57%	+39%
Hispanic	+86%	+154%

Source: Community Research Institute, *Emerging Trends, Healthy Seniors 2003*

Employment

As might be expected, employment rates decrease with age. There are also significant gender differences. Overall, for those 60 and over, 21 percent are employed—including 29 percent of men and 15 percent of women.

Age	% Employed
45-54	74%
55-61	N/A
62-64	50%
65-69	26%
70-74	11%
75+	4%

Economic Challenges

- Not surprisingly, the 45- to-54-year-old group—more of whom are still employed at full-time work—has a higher median household income (\$61,533) than those 65 or older (\$29,230).
- Among those over 65, there are significant differences related to living alone and gender: median household income for those living alone is \$26,453 for males and \$17,946 for females.
- Six percent of those over 65 have incomes below the poverty level.
- Among the 19,000 Kent County households receiving food stamps, 18 percent had residents age 60 and over.

Education

The group approaching traditional retirement age is more highly educated than those over 65.

	45-64	65+
High school diploma	89%	78%
Bachelor-level degree or beyond	30%	18%
Women/men with high school diploma	NA	Nearly equal
Women/men with bachelor-level or beyond	NA	15%/24%

Disabilities

Forty percent of those 65 and older report having a disability—most commonly a physical disability.

Marital Status

Fifty-six percent of adults 65 and over are married and live with their spouses. However, significant gender differences exist—and increase with age—as a result of women's longer life expectancies and higher likelihood of being widowed.

- Among 55-64 year olds, 76 percent of men and 66 percent of women are married.
- Among those 65 and older, 72 percent of men and 44 percent of women are married; 17 percent of men and 38 percent of women are widowed.

Housing

- 80 percent of Kent County's 65+ population own their own homes.
- Those 65+ comprise 10 percent of Kent County's population and 20 percent of the county's homeowners.

Community Involvement

More than 50 percent of those 45+ report involvement in volunteer activity:

- The highest levels of involvement are the 60-69 year-olds and the 45-59 year-olds.
- Religious organizations account for by far the largest area of volunteer activity (72 percent of those reporting volunteerism), with other organizational sectors ranging from 10 percent (environmental organizations) to 52 percent (educational organizations).

Community Involvement	
60 – 69	60%
45 – 59	57%
80+	52%
70 – 79	51%

Gender Differences in Kent County's 60+ Adult Population

A majority of adults 60+ in Kent County are women. They are less likely than men to be college graduates, employed or married and living with their spouse. Women in this age group who live alone have significantly lower household income than men living alone.

*Source: e.g. research

	Women	Men
Proportion of 60+ population*	58%	42%
Married/living with spouse		
• 55-64	66%	76%
• 65+	44%	72%
Widowed (65+)	38%	17%
65+ with four-year college degree or more education	15%	24%
Employed (60+)*	15%	29%
Median household income		
• 65+ and living alone	\$17,946	\$26,453

Race/Ethnicity Differences in Kent County's 65+ Population

White people 65+ fare better than other groups based on several indicators of well-being: they feel safer and more satisfied with their neighborhoods, engage more in social activities and physical activity, and are less likely to have a housing cost burden or need home modifications. They are also more likely to drive a car.

Source: Kent County AdvantAge Initiative: 2004 Survey Results

	Black/Hispanic/Other	White Non-Hispanic
Neighborhood		
• Feel safe in neighborhood	53%	81%
• Very satisfied with neighborhood	71%	88%
Participate in regular physical activity	46%	56%
Social engagement		
• Socialized with family/ neighbors in past week	66%	75%
• Attended movies/sports events/clubs/group events in past week	55%	72%
Drive a car	59%	83%
Housing		
• Pay more than 30% of income for housing	41%	19%
• Need home modifications to be able to remain in home	17%	6%

Analysis of Findings

Demographic projections for a dramatic increase in the size of the population over sixty – the “Floridization” of the U.S.—have received considerable media attention in recent years. In Kent County, as in much of the country, the number of 65+ residents is expected to double between now and 2030.

With a growing body of research focused on the aging population, one of the most promising findings is that this population shift will lead to a dramatic increase in the number of experienced adults who are available for—and strongly interested in—working to address community problems. A 1998 AARP study found that nearly half of baby boomers say they expect to devote more time to community service or volunteer activities during retirement.

The looming question is: Are communities prepared to engage this valuable resource? Research conducted by several national organizations suggests that the answer is no. As a 2005 *RespectAbility* survey revealed, “The nation’s leading nonprofit organizations are largely unequipped to use older Americans as lead volunteers...about half of those surveyed said their organizations had no system in place to screen, assess, or place older volunteers.”⁶

The Points of Light Foundation and Volunteer Center National Network came to a similar conclusion in their handbook, *50+ Volunteering: Working for Stronger Communities*:

*Designing new volunteer opportunities for older adults and working with the volunteers to set project goals, timelines, etc. will demand an initial investment of staff time from agencies...[it] will also require additional resources to promote these programs, train local agencies, and tend to the volunteers and projects.*⁷

Research conducted for the community assessment indicates that the situation in Kent County is consistent with findings of the recent national research: we are ill-prepared to effectively capitalize on the potential contributions of a growing 50+ population, particularly aging baby boomers. Several of our research findings relate to organizational capacity issues:

- **Lack of awareness among nonprofits about potential impact of the aging boom**
- **Inadequate volunteer management capacity in nonprofit organizations**
- **Strong nonprofit interest in strengthening capacity to engage experienced adults.**

We also found that in Kent County:

- **Programs offering some form of compensation for volunteers are extremely limited.**
- **Most experienced adults get involved through non-age-specific programs.**
- **Civic engagement sectors focused on older adults are not strongly connected.**

Many Organizations Are Unaware of the Potential Impact of the Aging Boom

Experienced adult volunteers currently play a huge role in the ability of many local organizations to deliver important services. More than 1,000 adults 55+ connect to volunteer opportunities in nonprofit agencies through the Retired Senior Volunteer Program (RSVP), and several hundred more are engaged in other age-specific programs such as those offered through the Gerontology Network, the Service Corps of Retired Executives, and Advocates for Senior Issues.

The age-specific programs account for only a small portion of the total number of experienced adult volunteers in the community, however. For example, among six non-age-specific organizations engaging large numbers of volunteers (300 to 4,000), adults 60+ comprise from 30 to 90 percent of the organizations’ volunteers.

Despite the fact that experienced adults are already serving such critical functions in these organizations, many local nonprofits and public institutions appear unaware of current research, trends and promising practices related to engaging experienced adults and their potential contributions to the community—even organizations with considerable experience in working with 50+ adults. Probably as a result of capacity issues, these organizations have not yet accessed information about innovative approaches to involving experienced adults, effective marketing strategies for reaching this age group, etc. (One reflection of this situation is the fact that many programs—even some recently-established ones—use terms such as “senior,” which current research shows to be an ineffective term in reaching many experienced adults, particularly boomers.)

“We’re still operating on those old models of who volunteers are and the kind of things they’re going to be doing. We tend to think of a top-down structure, asking volunteers to do a lot of routine tasks. We need to do more in the area of skill-based volunteering. How are we going to engage people in the future and give them tasks that allow them to use their expertise?”

--Interview respondent, 2006-2007

Some volunteer managers of these organizations have recognized changing dynamics among 50+ volunteers—for example, that boomers as a group seek more options, more flexibility, and more control than volunteers who are currently 65+. But they have not yet identified research-based strategies for addressing these differences. For example, there is little evidence that local nonprofit organizations are embracing more expansive approaches to involving volunteers—such as seeking volunteer engagement in higher level, more entrepreneurial positions—or exploring innovative approaches to compensating volunteers, such as providing prescription drug benefits or health insurance.

Many Organizations Lack Volunteer Management Capacity

The budget stresses facing nonprofits and public institutions have significantly impacted their volunteer management capabilities:

- Because volunteer management positions are often seen as entry-level jobs, many volunteer managers and coordinators have had little training in volunteer management.
- Among volunteer managers, low wages, heavy workloads, and inability to access training to improve and update skills are common. Volunteer management is often one of several areas of responsibility for a single employee.
- Lack of training and budgetary constraints present barriers to implementing volunteer management best practices, such as written policies and job descriptions for volunteers, development opportunities for volunteers, and regular measurement of the impact of volunteers.

Interviews with local nonprofit organizations affirm conclusions of the 2005 *RespectAbility* survey: capacity issues pose a formidable barrier to engaging effectively the emerging cohort of experienced adults.

Many Organizations Are Strongly Interested in Pursuing Opportunities for Enhancing Their Capacity to Engage Experienced Adults

The 2005 *RespectAbility* survey suggested that leaders of nonprofit organizations are so focused on the increasing strains on and immediate needs of their organizations that they show little interest in investing in their organizations' capacity to engage experienced adults. In Kent County, however, our research indicates that local nonprofits are not only open to but strongly interested in more effectively engaging the experienced adult population.

We found that civic engagement of experienced adults has not yet been addressed in training available to local nonprofits—whether through the local volunteer management professional association or, for the most part, national organizations with which local programs are affiliated. However, local nonprofit representatives expressed a strong interest in such training.

Limited Opportunities Are Available for Engaging Experienced Adults in Meaningful Income-Producing Activities

Numerous studies point to a growing number of people of traditional retirement age continuing to work—some full-time and many part-time—either out of necessity or for interest or enjoyment. According to the 1998 AARP survey, most boomers say they will still be working during their retirement years. In a 2006 AARP survey of more than a thousand Florida retirees, the most commonly cited reasons for continuing to work were “maintaining health insurance, paying out of pocket health care costs, and needing income.”⁸

Research conducted for Civic Ventures is consistent with the AARP findings, showing that some form of compensation could motivate a significant number of experienced adults to volunteer, and that health care-related compensation—such as prescription benefits—holds the most appeal.⁹ However, civic engagement opportunities providing some form of compensation—such as a stipend—are extremely limited in Kent County.

Fewer than 200 participants are involved in the Gerontology Network’s stipended volunteer programs, including the newly-established Experience Corps as well as Senior Companions, Foster Grandparents, and Traveling Grannies and Grandpas. (The latter three programs have been severely impacted by recent cutbacks in public funding.) Some Kent County programs—such as those involving volunteer drivers—offer mileage reimbursement and/or liability insurance.

Volunteering requires the availability not only of time but also of money for costs associated with volunteering—such as transportation and appropriate clothing. Without opportunities for some form of compensation for experienced adult volunteers, Kent County’s nonprofit organizations will miss out on the potential resources of a sizeable segment of the 50+ talent pool. The current dearth of stipended programs and budget cuts which have reduced the capacity of existing programs offering stipends do not augur well for the civic engagement of a large corps of diverse experienced volunteers.

Most Experienced Adults Get Involved Through Non-Age-Specific Programs

Experienced adults who are interested in lifelong learning, employment assistance, and volunteering can access several age-specific programs in Kent County—and thousands do take advantage of these opportunities. For example:

- More than 1,000 adults 50 and over enroll annually in courses offered by the Aquinas Emeritus College, the largest of four college-based lifelong learning programs in Grand Rapids.
- Several hundred experienced adults are employed through the Senior Community Service Employment Program and the Senior Citizen’s Service Co-Op, Inc.
- Several hundred experienced volunteers are active in age-specific programs of agencies including the Gerontology Network, Camp Fire USA Western Michigan Council, John Ball Park Zoo, as well as the Service Corps of Retired Executives and Advocates for Senior Issues.
- The Retired Senior Volunteer Program (RSVP) connects more than 1,100 experienced adults with volunteer opportunities in the community each year.

Although several thousand adults age 55+ engage through these age-specific programs in Kent County, recent community surveys have found that the total number of volunteers in this age group exceeds 50,000. This indicates that the vast majority find opportunities through community programs that are not specifically geared to 55+ adults.¹⁰

This finding suggests that we need to significantly increase the capacity of a broad range of nonprofit organizations and public institutions to more effectively leverage the resources of our experienced population—as well as building the capacity of age-specific programs.

There Are Limited Connections Among Various Civic Engagement Sectors

There appears to be little coordination within or among the three sectors offering opportunities for civic engagement for experienced adults—lifelong learning, employment assistance, and volunteering. Yet programs in each of these areas face similar challenges, such as limited resources for marketing. More cross-fertilization within and among the sectors could lead to mutual benefits, such as sharing resources for functions including:

- Marketing to experienced adults
- Training staff members on working with experienced adults
- Providing development opportunities for volunteers
- Research and data collection.

Opportunities for Engaging Adults 50+ in Meaningful Community Roles

*If grantmakers are truly concerned about the capacity of nonprofits to do the work they set out to do, they ought to be providing more capacity-building and leadership support.*¹¹

Through surveys, interviews and focus groups involving nonprofit leaders and grantmakers, Grantmakers for Effective Organizations (GEO) explored last year how funders could more effectively help nonprofits achieve their missions. The summary of phase I of this GEO Change Agent Project, *Listen, Learn, Lead*, challenges the grantmaking community to “[trust] nonprofits to do their work and [equip] them with the support they need to get the job done.”¹²

An example of the *Listen, Learn, Lead* approach is the Grand Rapids Community Foundation’s Creating Community for a Lifetime initiative. Through this process, the Community Foundation has helped raise awareness among hundreds of community stakeholders of the issues and opportunities presented by experienced adults and, in particular, by the aging of the boomers. Involvement in work groups, community forums and the CCFL leadership council has enabled representatives of dozens of community organizations to gain deeper understandings of the implications of this change. In addition, Community Foundation grantmaking has jump-started the process of engaging key nonprofit organizations in innovative pilot programs to mine the talents and energy of adults 50+ in community improvement.

“We need to shift our minds as administrators—to look at what can draw baby boomers into our programs.”

--Interviewee, 2006-2007

The community assessment has helped us to build on our learning in the area of promoting social and civic engagement by examining more closely national research and promising work in other communities and identifying barriers and possibilities in Kent County. Over and over again, as we conducted our local research, the arena that offered the greatest potential for having a significant impact was nonprofit capacity-building. Through capacity-building endeavors in partnership with nonprofits, we can capture and communicate the significant learnings of the last three years to support the nonprofits who engage every day in the hard work of creating a better community for all.

Our research suggests several promising strategies for enhancing the capacity of the community to leverage the capabilities of adults 50+. The strategies fall on a spectrum ranging from approaches requiring fewer resources and involvement of fewer partners to increasingly complex scenarios addressing more and more components of the community, thus calling for increased investment. These strategies can stand alone or can build on each other if implemented sequentially:

- Promising Practices Curriculum for Nonprofits
- Promising Practices Consortium
- Legacy Leadership Institute
- Virtual Next Chapter.

Promising Practices Curriculum for Nonprofits

Activity

Develop and offer a curriculum for local nonprofit leaders in “Promising Practices for Engaging Adults 50+ in Sustaining Your Organization.” The curriculum could range from a single session to a series of workshops.

Rationale

- The curriculum would serve as a core tactic in a knowledge marketing strategy that involves developing and delivering knowledge gained in the three-year aging initiative that can help nonprofit leaders solve problems and improve their practice.¹³
- The content of the curriculum would convey key learnings of our work to date to those organizations in a position to create multiple opportunities and practices for engaging adults 50+ in the work of improving the community.
- The learning process would provide an opportunity for nonprofit leaders to engage in meaningful dialogue with their peers on mutual issues related to engaging adults 50+ in professional- or leadership-level volunteer roles.

Potential Funding Needs

- Curriculum development
- Marketing and outreach
- Event planning/implementation
- Technical assistance/Facilitation (from leading training sessions to follow-up and coaching services as local nonprofits apply their learning within their organizations)

Promising Practices Consortium

Activity

Convene a group of nonprofit agencies in a learning community focused on developing their organizational capacity for engaging experienced adults in high-impact community roles.

The Promising Practices Consortium would develop training, tools and models for enhancing nonprofit organizations’ capacity by effectively recruiting, engaging, and retaining “legacy volunteers” (adults age 50+) in high-impact roles. This process might include:

- Enhancing the partner organizations’ knowledge and understanding of an asset-based approach to engaging experienced adults, including case studies and models of effective approaches from other communities
- Developing and employing a process/tool for assessing an organization’s readiness to address the expectations, requirements and needs of 50+ volunteers, as well as its volunteer management capabilities
- Building and implementing individual organizational development plans based on the assessment results, including organizational goals for engaging experienced adults and implementation strategies such as:
 - Identifying opportunities to leverage the capabilities of experienced adults in mission-focused, high-impact roles throughout the organization
 - Developing a human resources infrastructure to support “legacy volunteers” (e.g., job descriptions, liability/health insurance options, stipends, transportation reimbursement, learning and advancement opportunities, flexible job design options, etc.)
 - Addressing staffing and resource needs to support a “legacy volunteer” initiative
 - Cascading knowledge and understanding of an asset-based approach to aging to staff at all levels of the organization.

Rationale

- The consortium would provide an ongoing opportunity for cascading the knowledge gained in the Community Foundation’s multi-year aging initiative to address the community’s Social and Civic Engagement objectives while strengthening the capacity of the nonprofit community.
- The consortium could play a leadership role in further cascading the knowledge to its constituencies.
- Tools, models and processes developed would provide a useful toolbox for additional organizations in the community—and beyond—to help quick-start efforts to engage adults 50+ as their capabilities and potential become increasingly evident.
- The learning process would provide an opportunity for nonprofit leaders to develop meaningful relationships with their peers based on mutual issues related to engaging adults 50+ in professional- or leadership-level volunteer roles.

Potential Funding Needs

- Coordination/facilitation of the consortium
- Learning opportunities/expert presentations
- Agency stipends
- Agency planning grants
- Documentation, communication, knowledge marketing:
 - Conducting cost/benefit analyses of agency initiatives at periodic intervals after their launch
 - Refining tools, processes and models that can be replicated in other organizations in the community and beyond
 - Developing a plan for disseminating the learnings to other nonprofits in the community.
- Assessment: documenting evidences of success based on desired outcomes (e.g., the five outcomes identified in *RespectAbility’s Profiles of the Most Promising Initiatives Engaging Adults Age 55+* report, page 2), the challenges, and lessons learned in the process.

Model Programs/Resources

- “Volunteer Management Practices and Retention of Volunteers.” Mark A. Hager and Jeffrey L. Brudney. The Urban Institute, Washington, D.C. June 2004. www.urban.org.
- “Balancing Act: The Challenges and Benefits of Volunteers.” Mark A. Hager and Jeffrey L. Brudney, The Urban Institute. Washington, D.C. December 2004.
- Intergenerational Training Experts Network (ITEN). Center for Intergenerational Learning, Temple University. Philadelphia, PA. www.templecil.org.
- “Nonprofit Organizational Assessment Tool: Volunteer Management.” Andrew Lewis. The Nonprofit Management Education Center, University of Wisconsin Extension. www.uwex.edu.

Activity

Facilitate a collaborative “learning-and-doing” venture focusing on a specific issue, an adaptation of the Legacy Leadership Institute model developed by Laura B. Wilson at the University of Maryland.

The lead organization identifies an issue area (e.g., child development, school achievement, environmental protection, public policy, long term care) and recruits appropriate community organizations to serve on a Partnership Council (e.g., universities, lifelong learning centers, nonprofits who will engage the Legacy Leaders):

- The Partnership Council plans, develops and implements a program to recruit, train, and place 20 “Legacy Leaders” a year, people age 50+ who commit to the training and to playing a leadership role in addressing the identified issue.
- After a year of service, Legacy Leaders agree to serve on a Legacy Leadership Council to facilitate and support participants’ ongoing leadership and service.
- Based on the results of the first Institute, subsequent Institutes could be developed to address other pressing community issues.

Rationale

- The Institute model combines lifelong learning and civic engagement to develop a growing corps of people 50+ in the community who play a leadership or high-impact role in addressing key community issues.
- At the same time, the model serves to enhance the capacity of community organizations to engage experienced adults effectively in their organizations’ mission-driven activities.

Potential Funding Needs

- Planning
- Facilitating/documenting/administering the Partnership Council and Legacy Leadership Council
- Training
- Communications and knowledge marketing
- Evaluation

Model Programs/Resources

- “Legacy Leadership Institutes,” *RespectAbility in America: Profiles of the Most Promising Initiatives Engaging Adults 55+*, National Council on Aging, August 24, 2006, www.respectability.org.
- “Program Taps Rich Resource of Leadership,” Linell Smith, Baltimore Sun, March 4, 2007, www.baltimoresun.com.
- “Making a Difference for Older Adults and the Environment,” final report of the Wildfowl Trust of North America and Chesapeake Bay Environmental Center to the U.S. Environmental Protection Agency, November 15, 2006 www.epa.gov/aging/grants/ais/legacy_ldrshp.htm.

Activity and Potential Partners

Design and implement a “virtual Next Chapter” using the Civic Ventures model. Develop tools and build the capacity of the aging services system to provide key components, with multiple “gateways” to the Next Chapter system.

The Next Chapter web-based system would have a physical home: a “Connections Café,” possibly located at a public library. The Cafe would serve as the “gateway” to the Next Chapter virtual system, serving as the **Peer and Community Connections** component to give adults 50+ access to places and programs that foster connections to people of all ages in the community.

Access to the other three Next Chapter core components would be through the Connections Café web site, which would provide online tools and directories. Community organizations with expertise in particular components—for example, in workforce development—would take responsibility for designing and maintaining the databases/tools associated with that topic. They might also offer more in-depth or one-to-one services through their organizations.

Core Components -- Next Chapter
Life Planning Programs – to help adults 50+ assess their current status and strengths, explore and envision future possibilities, and make choices by setting goals and plans.
Meaningful Engagement through Work and Service – to encourage and help adults 50+ navigate opportunities to take on service roles, through paid work and volunteer service.
Continued Learning for New Directions – to provide adults 50+ a broad range of learning options that allows them to enrich their lives and retool for new careers.

Local partners would be convened for planning and implementing the strategy and developing the web-based services/options directory, life planning programs, etc. Actual participant programs—training, educational, exploratory—could be facilitated using a peer leader approach, and held at the Connections Café or throughout the community. The scope of this endeavor may call for additional local and national funder participation.

Rationale

- The web-based approach – with multiple opportunities for face-to-face interactions – would accommodate diverse styles and preferences for accessing information in a cost-effective way.
- The Next Chapter approach would address the need both to build capacity among organizations in the community and to build connections among various civic engagement sectors.
- The Next Chapter approach is a research-based model that enables us to leverage the expertise and knowledge of a national leader in social and civic engagement, Civic Ventures.

Potential Funding Needs

- Planning
- Web site development and hosting
- Tools development (e.g., life planning program linked to directory(ies) of paid and unpaid opportunities, lifelong learning opportunities, etc.)
- Facilitating, documenting, administering planning/steering committee
- Facilities/operations
- Communications and knowledge marketing
- Evaluation

Model Programs/Resources

- Tempe Connections. Tempe Public Library. Tempe, Arizona. www.tempeconnections.org.
- *Blueprint for the Next Chapter*. Civic Ventures. San Francisco, CA. May 2005. www.civicventures.org.
- *Life Planning for the Third Age: A Design Guide and Toolkit*. Margaret Newhouse with Judy Goggin. Civic Ventures. San Francisco, CA. 2003.
- "Mapping Your Future Your Way." Chicago Life Opportunities Initiative. Council for the Jewish Elderly. Chicago, IL. www.cje.net.
- Lifelong Access Libraries. Libraries for the Future. Americans for Libraries Council. www.lff.org.

Lessons Learned

“Devoting adequate resources up front—including both time and financial support for research—helps maximize the potential for a significant return on the funders’ investment and minimize false starts.”

National research and knowledge marketing on civic engagement of experienced adults is critically important. Because civic engagement of experienced adults is an emerging field, it is a daunting task for individual nonprofit organizations to develop the background knowledge necessary to craft thoughtful, research-based plans for more effectively leveraging the resources of experienced adults. Tools such as the recent RespectAbility reports (*Profiles of the Most Promising Initiatives Engaging Adults 55+* and *Promising Practices in Civic Engagement among Adults 55+*) play a critical role in helping nonprofits develop a baseline knowledge of this emerging field. The Community Experience Partnership’s learning community approach has been very helpful to address this challenge—e.g., by using the initiative’s web site to provide access to new research findings.

Without tools such as the RespectAbility reports, individual nonprofits (both funders and service-providing agencies) face the time-consuming, resource-intensive task of conducting their own research and building a knowledge base from scratch—leading to a simultaneous process of many organizations reinventing the wheel. This situation has important ramifications for funders: If funders issue requests for proposals for civic engagement projects, how many resources must nonprofits expend in order to develop their proposals?

Accessing useful quantitative data may present a formidable challenge. Accessing and interpreting quantitative data related to civic engagement of experienced adults can be a daunting task, given the lack of consistency in data from different sources. For example, it’s difficult to extrapolate information about baby boomers from U.S. Census data because the census age groupings do not coincide neatly with the boomer age group. Different data sources – both local and national – often employ different age groupings, making comparison difficult. Locally, some of the sample sizes are too small to enable us to get reliable information about specific populations (e.g., racial minorities, people with disabilities). Because of these kinds of issues, we found that it was not feasible (from a cost or time standpoint) to get some of the quantitative data we initially hoped for. We also found that involving a partner with data-gathering and analysis expertise was a critical factor.

Interviews provide a vehicle for gaining important qualitative information while at the same time building relationships. The one-on-one interviews conducted for the assessment yielded valuable narrative information—for example, helping us to assess whether findings from national research are reflected in the local community. We took advantage of the interviews as an opportunity not only to gain information but also to share information, e.g., about current research related to civic engagement of 50+ adults. The interviews enabled us to build awareness of Grand Rapids Community Foundation’s commitment to supporting civic engagement of 50+ community members and to plant the seeds for the agencies’ involvement in future projects addressing this area. Interviews can provide an opportunity to build relationships in a way that is not typically possible through other data collection methods, such as surveys.

Doing our homework, embracing a holistic view and being open to challenging our own assumptions are critical to our long-term success. There are many potential approaches and strategies to address the challenge of engaging experienced adults in our communities—including social marketing to create more positive attitudes about aging, recruiting efforts to attract more experienced adults to public service, and capacity building initiatives focused on nonprofit organizations. Devoting adequate resources up front—including both time and financial support for research—helps maximize the potential for a significant return on the funders’ investment and minimize false starts. For example, efforts to mobilize large numbers of experienced adults will not achieve the intended results if community agencies have not built the capacity to effectively engage those who are mobilized.

Conclusion

As we embark on the 21st century, our community faces enormous social and civic challenges – in our families, schools, neighborhoods and cities; in our rapid move toward a new economy; in our evolving political systems. As resources diminish, it's difficult to imagine where our community will find the wherewithal to address these tough issues and flourish in this new century.

An array of scholars and social entrepreneurs point to aging baby boomers as potential leaders in transforming our communities for good. According to civic engagement expert Marc Freedman, our communities' most experienced citizens represent a truly remarkable "renewable resource." But, as this community assessment reveals, we have a lot to learn and do before we can mine this resource for its true value.

"The community assessment has uncovered infrastructure issues that need to be addressed locally in order to unleash the potential of experienced adults in our community."

The community assessment has uncovered infrastructure issues that need to be addressed locally in order to unleash the potential of experienced adults in our community. We are not alone – a recent *Issue Brief* from The Conference Board assessed the readiness of nonprofits nationally to tap the time, talent and passion of the baby boomers as they begin to turn 60. Their finding:

...nonprofits are seriously lagging behind government and private sectors in efforts to both retain highly skilled potential retirees within their organizations and actively recruit older hires from other industry sectors.¹⁴

The report urges nonprofits to invest in human resource and volunteer management, as well as in advancing their understanding of the needs and preferences of boomers. It urges funders to support this kind of organizational development. And it encourages communities and organizations to build on the research and promising practices being developed throughout the country.

The community assessment has provided significant knowledge and insights into current thinking and best practices associated with engaging experienced adults in community work. The Community Experience Partnership has provided access to data, resources and a learning community that would be hard to match working alone. The in-depth analysis of national and local resources, the relationships we have formed, and the "playbook" of strategies that resulted from this project give clear focus and direction for our efforts -- and create an impetus to act. Now is the time for organizations and individuals in our community to work together to translate this learning and these plans into reality.

Endnotes

1 "Joining Strength to Strength: Realizing the Potential of an Aging Community," Phase II Briefing, Creating Community for a Lifetime, Area Agency on Aging of Western Michigan and Grand Rapids Community Foundation, Grand Rapids, MI, June 2006, page 2, www.community4alifetime.org.

2 "Joining Strength to Strength," page 2.

3 "Joining Strength to Strength," page 5.

4 The primary data sources are the 2000 U.S. Census and the U.S. Census Bureau's 2005 American Community Survey. Additional sources for workforce data included the Michigan Labor Market Information, the National Center for Education Statistics, and the U.S. Bureau of Labor Statistics. Sources for the community involvement and well-being data were the Community Research Institute's 2006 Kent County Giving and Volunteering Survey and CRI's 2006 Greater Grand Rapids Community Survey. The Community Research Institute was the primary provider of data, with additional demographic data provided by Dr. Ellis Godard, of e.g. research, whose services were provided through the Community Experience Partnership.

5 Except where otherwise noted, all data is drawn from the Community Research Institute's analyses of 2005 American Community Survey data from the U.S. Census Bureau. Some other data is drawn from the 2000 census. Baby boomers are those born between 1946-1964. In 2000, boomers ranged in age from 36 to 54. In 2005, boomers ranged in age from 41 to 59. Most census figures are based on data subsets for five or ten year increments—and do not allow precise correspondence with boomer data.

6 As cited in "Older Americans and Civic Engagement in the 21st Century: A Review," National Council on Aging, Washington, D.C., 2006, page 17. Accessed 1/9/2007 at www.respectability.org.

7 "50+ Volunteering: Working for Stronger Communities," Points of Light Foundation, Washington, D.C., 2004, page 19. Accessed 1/9/2007 at www.PointsofLight.org.

8 "Social Security and 50+ Workers: A Survey of AARP Florida Members," Joachim Bruess and Erica L. Dinger, AARP Research Report, August 2006. Accessed 4/2/2007 at www.aarp.org.

9 "The New Face of Retirement: An Ongoing Survey of American Attitudes on Aging," A Survey Conducted for Civic Ventures by Peter D. Hart Research Associates, August 2002, page 7.

10 Both the 2004 AdvantAge Initiative survey and the 2006 Kent County Giving and Volunteering survey indicate that more than half of the 55+ adults are engaged in some type of volunteer activity. Generalizing to Kent County's population of more than 108,000 residents 55 and over, more than 50,000 experienced adults in the county are doing some type of volunteering.

11 "Listen, Learn, Lead: Grantmaker Practices that Support Nonprofit Results," the Change Agent Project, Grantmakers for Effective Organizations, Washington, D.C., 2006, page 11.

12 "Listen, Learn, Lead," page 11.

13 "Marketing Your Knowledge: A Report to Philanthropy's R&D Organizations," Williams Group for the David and Lucille Packard Foundation Knowledge Project, page 5. Accessed 3/30/2007 at www.wgsite.org.

13 "Boomers Are Ready for Nonprofits, But Are Nonprofits Ready for Them?," Literature Review/Issue Brief, The Conference Board, May 31, 2007, page 1.

Community Assessment Partners

The Grand Rapids Community Foundation www.grfoundation.org

The Grand Rapids Community Foundation is the oldest community foundation in Michigan, founded in 1922. Through grantmaking and leadership initiatives they help build economic security, foster academic achievement, support human wellness, achieve ecological integrity, create vibrant neighborhoods and enrich the lives of the people in Kent County, Michigan. With assets of \$230 million, the Community Foundation awarded more than \$6.2 million in grants and scholarships in FY 2006.

Community Experience Partnership (CEP)

The Community Experience Partnership, a national initiative sponsored by The Atlantic Philanthropies, is aimed at expanding opportunities for experienced adults to become engaged as vital civic resources in their communities. Phase one of CEP engaged 30 community foundations in the U.S. in developing a knowledge base about local resources and strategies that offer opportunities to tap the talents of older adults.

The Atlantic Philanthropies www.atlanticphilanthropies.org

Atlantic Philanthropy is a private foundation that supports programs worldwide, is dedicated to bringing about lasting changes in the lives of disadvantaged and vulnerable people. Atlantic focuses on critical social problems related to aging, disadvantaged children and youth, population health, and reconciliation and human rights. In 2005, The Atlantic Philanthropies made approximately 200 grants totaling \$289 million. The Atlantic Philanthropies comprise The Atlantic Foundation and The Atlantic Trust, both based in Bermuda; several smaller philanthropies, based principally in the United States and Great Britain; and regional service companies that select and evaluate potential grant recipients, and oversee grants once awarded.

Community Research Institute (CRI) www.cridata.org

The *Community Research Institute* (CRI) performed quantitative analyses for the assessment. These analyses focused primarily on demographic, workforce and giving and volunteering data. CRI's principal researcher for the community assessment has been Korrie Ottenwess, M.P.A. Ms. Ottenwess has completed a variety of assessment projects for the Grand Rapids Community Foundation, including the comprehensive AdvantAge Initiative survey of the 65+ population to learn about their experiences in and perceptions about Kent County.

Housed at Grand Valley State University's Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership, CRI monitors changing local and regional social conditions and provides this information to the local nonprofit and philanthropic community. CRI employs researchers with expertise in social research, Geographic Information Systems (GIS) and community outreach.

Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership

www.gvsu.edu/philanthropy/

The Johnson Center at Grand Valley State University is dedicated to the study and teaching of nonprofit management, volunteerism and philanthropy. The Center's Philanthropic and Nonprofit Knowledge Management Initiative (PNKM) captures, organizes, disseminates and promotes the use of good practices in the nonprofit sector. Supported by a five-year \$3.4 million W.K. Kellogg Foundation grant, the PNKM initiative provides resources including:

- The Grantmaking School, the nation's first university-based program for teaching the techniques and ethics of grantmaking specifically to foundation grantmaking professionals
- The Nonprofit Good Practice Guide, providing internet-based access to thousands of resources in ten topic areas, including volunteer management.

Consultants

Dotti Clune and Jeannie Hosey, Social Issues Research and Project Design Consultants, have been the primary consultant team working in concert with Grand Rapids Community Foundation to create and implement the project strategies of the Creating Community for a Lifetime initiative. They have been integral in aiding the Community Foundation in defining the initiative's direction, focus, and scope. Over the past four years, they have become well versed in the national discussion and movement toward creating communities for all ages. The consultant team has extensive experience in other community assessment projects, with a focus on qualitative research, and in community initiatives addressing a variety of social issues.

Additional Information

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