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Expanding the Boundaries *of Corporate Volunteerism*

RETIRES AS A VALUABLE RESOURCE

support

A REPORT FROM THE RESEARCH FROM UNTAPPED ASSETS:
Mobilizing Retirees for Civic Engagement Project

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AUTHORS

Kathy Burnes, M.E.D.
*The Center for Corporate
Citizenship at Boston College,
Project Manager*

Judith G. Gonyea, Ph.D.
Boston University, Project Consultant

PROJECT STAFF

LaVerne Campbell, M.P.A.
Volunteers of America, Project Liaison

Bradley K. Googins, Ph.D.
*The Center for Corporate
Citizenship at Boston College,
Principal Investigator*

Joanna Kreil
*The Center for Corporate
Citizenship at Boston College,
Research Assistant*

Jessica Landis, M.A.
*The Center for Corporate
Citizenship at Boston College,
Research Assistant*

Julie Manga, Ph.D.
*The Center for Corporate
Citizenship at Boston College,
Project Advisor*

Margaret Ratcliff, M.S.W.
Volunteers of America, Project Liaison

ABOUT THE PARTNERS

THE CENTER FOR CORPORATE CITIZENSHIP AT BOSTON COLLEGE is a membership-based research organization committed to helping business leverage its social, economic and human assets to ensure both its success and a more just and sustainable world. As a leading resource on corporate citizenship, The Center works with global corporations to help them define, plan and operationalize their corporate citizenship. Through the power of research, executive education and the insights of its 350 corporate members, The Center creates knowledge, value and demand for corporate citizenship.

The Center offers publications including a newsletter, research reports, and white papers; executive education, including a Certificate program; events that include an annual conference, roundtables and regional meetings; and a corporate membership program.

VOLUNTEERS OF AMERICA is a national, nonprofit, spiritually based organization providing local human service programs and opportunities for individual and community involvement. Founded in 1896, Volunteers of America focuses on caring for the elderly and disabled and fostering their independence, promoting self-sufficiency for the homeless and for others overcoming personal crisis, and supporting positive development of troubled and at-risk children, with the goal of helping people become as self-reliant as possible. Every year, nearly 2 million people feel the helping hand and compassion of Volunteers of America.

Volunteers of America is one of the nation's largest nonprofit providers of quality affordable housing for families, the elderly and people with disabilities, and is a major provider of skilled long-term nursing care and health services.

Confidentiality guarantees made to participants require that individual and company names not be used in reporting the findings. This report, therefore, uses geographic regions and industry to describe corporations.

PREFACE

For 25 years the National Retiree Volunteer Coalition (NRVC) has assisted corporations to develop retiree volunteer programs to address critical community needs. The workplace and workforce have changed significantly during this time. When Volunteers of America brought this program into its organization, it began looking for research on current corporate experience and thinking on the issues of retirement and corporate responsibility and found little information. We determined that original research on the topic would enhance our understanding and could benefit the entire field and The Center for Corporate Citizenship at Boston College was selected as the research partner. With grant support from Atlantic Philanthropies, Volunteers of America and The Center undertook the work described in this report.

The research provides rich insights into the rapidly changing corporate environment and corporate social responsibility. We believe the findings have important implications for both corporations and non-profit agencies. This report identifies current approaches, challenges and opportunities, as well as trends in corporate volunteerism. It provides practical information that can assist corporations with stand-alone programs for retirees, such as those established with NRVC's assistance, as well as those with programs for employees that also engage or could engage retirees to adapt and develop their efforts. The information can also assist nonprofit agencies to proactively plan so that retirees want to join their volunteer forces addressing community needs. It suggests exciting opportunities for corporations and community organizations to partner and prepare employees for a lifetime of volunteering.

We look forward to continued dialogue on this topic and would appreciate hearing your experiences and thoughts. Copies of this report, as well as the full research report, can be downloaded from both www.volunteersofamerica.org and www.bc.edu/corporatecitizenship.

Jimmie Walton Paschall
Executive Vice President
External Affairs,
Volunteers of America

Bradley K. Googins, Ph.D.
Executive Director,
The Center for Corporate
Citizenship at Boston College



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THE CHALLENGE

Employee volunteer programs have flourished throughout the United States during the past several decades. They are generally regarded as highly successful, offering benefits to companies, employees, nonprofit organizations, and local communities. Yet, with the aging of our nation's labor force and new definitions of retirement, are American companies thinking strategically about ways to capture the talents and energies of the baby boomer generation to expand the boundaries of corporate volunteerism? This is the challenge explored in the research project "Untapped Assets: Mobilizing Retirees for Civic Engagement."

INTRODUCTION

Employee volunteer programs have emerged as an important component of the corporate social responsibility initiatives of American companies. Indeed, there is evidence of the proliferation of company volunteer programs not only in the United States, but also in Europe. Studies suggest that slightly more than 80% of large companies in the United States have employee volunteer programs. For example, The Center for Corporate Citizenship at Boston College found in a 2004 survey of 135 of its corporate members that 85% offer an employee volunteer program. A recent analysis by the Points of Light Foundation of Fortune 50 and Fortune 500 company websites found that 94% and approximately 62%, respectively, mention the volunteering efforts of their employees.

Despite the abundance of employee volunteer programs, there has been relatively little systematic evaluation of these initiatives. Anecdotal evidence and case studies suggest, however, that employee volunteer programs are generally viewed as being "successful." They are widely cited as offering benefits to the

company, the employees, nonprofit organizations, and targeted community or population.

Gains to employers include improving public image and community relations, increasing ability to recruit and retain valuable employees, fostering team spirit and company pride among employees, and enhancing the quality of life in the communities in which they operate. Employees view volunteer programs as an opportunity to develop leadership skills, raise self-confidence and feelings of self-worth for making a contribution, and building friendships and social relations in the workplace. Nonprofit organizations and communities benefit from employee volunteer programs through their ability to garner much needed resources, serve a broader constituency, and create healthy communities.

Given these successes and benefits, the continued expansion of employee volunteer programs is likely. In fact, there is a move to broaden and deepen the employee stakeholder role by better integrating and aligning employee volunteer programs into the larger corporate citizenship strategies of corporations.

“I think our Alumni Volunteer Program is serving as a great bridge for keeping retirees and current workers more connected. The program offers several volunteer opportunities per month and we hold joint alumni/current employee volunteer projects at least once a quarter.”

—Northeast Financial Services, Vice President,
Community Affairs

Curiously lacking from future-oriented discussions on how to strengthen employee volunteer programs is, however, any mention of retirees as valuable resources or assets. This lack of connection between employee volunteer programs and the changing nature of retirement in the United States is somewhat surprising as attention grows regarding other issues related to the aging of our nation's workforce.

With nearly one-fifth of the workforce projected to be age 55 and older by 2015, older workers will be essential to the success of companies. The AARP reports that more than half of its 35 million members are still in the workforce. More significantly, 80% of baby boomers surveyed by the AARP and The Independent Sector in 2002 indicated they plan to work in retirement. As Americans continue to

redefine retirement, a growing number of individuals are choosing phased-retirement or returning to the same company after retirement for a more flexible work program or schedule.

In 2004, The Center for Corporate Citizenship at Boston College and Volunteers of America, Inc. jointly engaged in a study to both assess trends in companies linking volunteerism efforts to their retired workforces and receptivity of companies, employees, and retirees to strengthen this link. We conducted telephone interviews with key executives charged with corporate community relations or corporate philanthropy in 22 national corporations from a variety of industries and headquartered in different regions throughout the United States. We analyzed surveys from more than 1,000 midlife employees and recent retirees from four national companies and also conducted six focus groups with older workers and retirees in three companies.

In this pioneering report, we present the key findings and discuss implications of promoting retiree volunteerism. The report is timely for several reasons. First, the aging of the baby boomer generation suggests that the ranks of the retired worker population will grow dramatically in the next few decades. Second, retirement is being redefined—for a greater number of persons there is a more fluid transition between paid work and retirement as evidenced by bridge jobs, phased-retirement, and post-retirement reentry to the workforce. Third, the flourishing of company volunteer programs may represent an important mechanism through which older workers, retirees, and/or alumni can remain engaged and make significant contributions to improve the quality of life in America's communities.

CORE FINDINGS

Several core findings emerge from data collected from three sources: 1) interviews with key corporate managers from a variety of sectors; 2) focus groups with employees and retirees; and 3) quantitative survey responses of employees and retirees. These include:

Business needs to address aging workforce.

Many companies stated having a “business need” to develop strategies to address the aging of America’s labor force, possible future worker shortages, and the new definitions of retirement—for example bridge jobs, phased-retirement, second careers.

Maintaining good will with retirees a benefit.

Responding to the changing business landscape, several companies surveyed identified the importance of maintaining contact and “good will” with departing employees—whether they are leaving for retirement or to pursue a new job or career. In these companies, departing workers retain a valued status as “alumni.”

Relations with retirees positive.

Despite a difficult economic climate—including global competition, corporate mergers and acquisitions—employees and retirees surveyed generally characterized the relationship between the company and its retired workers as a positive one.

Retirees not strategic part of volunteer programs.

Most of the surveyed companies currently include retirees in their volunteer efforts. Only a few companies, however, strategically target retirees or

devote company resources to the recruitment of retirees into their volunteer initiatives.

More corporate leadership needed.

The vast majority of individuals surveyed strongly agree that corporate America should provide greater leadership in promoting volunteerism in local communities. They also strongly believe that companies could play a valuable role in helping community agencies “retool” and create quality volunteer experiences.

Need to publicize volunteer opportunities.

Employees and retirees expressed interest in receiving assistance from their companies to learn about and access volunteer opportunities in their communities. Of particular interest is the use of company websites and/or workshops (relatively low-cost programs) to enable individuals to match their interests and skills with particular volunteer programs.

Solid interest in volunteering through workplace.

Although only about one out of every five employees surveyed reported currently participating in a company-sponsored volunteer program, many expressed at least a “moderate interest” in volunteering

“I guess the upside is the engagement of retirees with active associates so that they feel a part of the company, they feel good will to the company, they feel supported by the company, recognized by the company for their efforts. By being engaged, then they usually are more engaged with our current products and with our current strategy within the company and then they work as goodwill ambassadors not only for the community agency that they are working with but also for our company.”

—Southeast Financial Services, Senior Vice President

through the workplace when they retire. In general there is a preference for volunteer programs that integrate employees and retirees as respondents see additional benefits in an “intergenerational exchange.”

Important to develop volunteer DNA before retirement.

Corporate managers, employees, and retirees see the importance of developing the volunteer “DNA” long before retirement. For maximum impact, companies should promote volunteerism early on and throughout the employment experience.

Volunteer involvement reflects changing times.

Time to deal with work and family concerns are significant factors in the availability of employees and

retirees to volunteer; volunteer work that is project based rather than work that requires long standing, continuous involvement is preferred.

Business case for including retirees.

Employees and retirees surveyed feel there is a “business case” to be made for including retirees in corporate volunteer programs. Not only can retirees increase a company’s core number of volunteers, but there is no “hidden cost” of work-release time for retirees. Companies can also improve their reputation through the use of retirees as ambassadors in the community.

Corporate Interviews

Employee volunteer programs offer a vital resource to communities across the country.

Company volunteer programs are now well established throughout the United States. All of the 22 surveyed companies supported both individual and group volunteer efforts of their employees.

The most frequent support offered by companies is the use of intranet websites to provide employees with a clearinghouse for volunteer opportunities.

Approximately 86% of companies had a volunteer website.

More than three-quarters (77%) of the companies provide donations to organizations for which employees and, in some cases, retirees volunteered. The size of the donations ranged from \$300 to \$1,000 per employee or retiree. These programs, commonly known as Dollars for Doers initiatives, foster the civic engagement of thousands of individuals in communities large and small across the country.

One third of the companies have paid time off policies for employee volunteerism. Across companies, the policies differ in terms of the amount of time off, the type of volunteer activity, and the approval process.

Numerous companies involve retirees in their volunteer initiatives.

Many of the surveyed companies recognize that retirees are ambassadors with important institutional memory and knowledge that can benefit the company and the community. Almost half (47%) of the 22

companies include retirees in their group volunteer programs.

More specifically, of the 19 companies that provide a clearinghouse function for volunteer opportunities, 57% provide access to retirees.

Forty-four percent of the 17 companies with Dollars for Doers programs make it possible for their retirees to participate. Of the 73% of companies with formal awards or recognition programs, 50% include retirees as possible honorees or award recipients.

Many companies are adapting their volunteer initiatives to respond to the transforming needs and concerns of retirees.

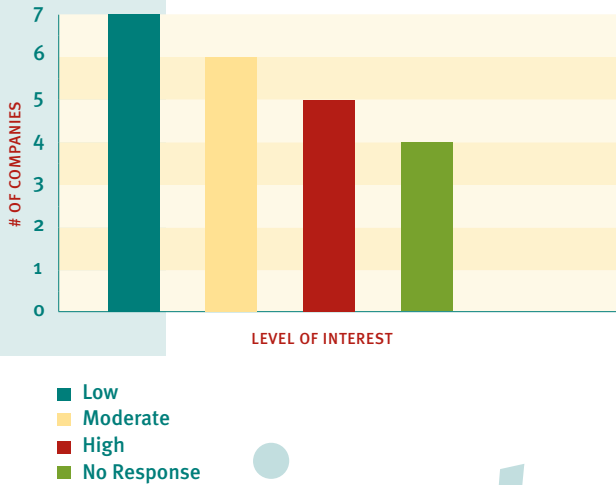
The challenge of recruiting and motivating retirees is different than in the past. Many retirees continue to work and/or now have multi-generational family commitments. Employers indicated it is harder to find the kind of leaders who can take on a long term commitment. Tapping into the ability of retirees to participate in shorter-term projects is a way to engage those who want to be involved but have competing priorities.

“...I think that the big massive huge teams of retirees I had years ago that really put in a lot of time into the development, creation and implementation of the program, they are not willing to do that as much anymore and they hate the meetings now. So it’s just that they are willing to do the short term community services projects; we fill them up; that doesn’t seem to be a problem.”—MIDWEST UTILITY, CORPORATE RELATIONS MANAGER

TABLE 1: Corporate Volunteer Programs and Retiree Participation

TYPE OF CORPORATE VOLUNTEER ACTIVITY	YES %	RETIREE INVOLVEMENT %
Group Volunteer Projects	100	45
Formal Policy for Paid Time off	33	n/a
Loan Workers to Community Causes	59	n/a
Act as Clearinghouse for Volunteer Opportunities	86	53
Dollar for Doers	77	44
Awards and/or Recognition	73	50

CHART 1: Leadership’s Level of Interest in Building a Stronger Connection to their Retirees



Although many companies include retirees in their volunteer programs, leadership has not expressed a strong level of interest in strengthening the role of retirees.

Half of the managers interviewed reported either a low level of interest or an inability to even estimate leadership’s interest in retiree volunteerism; given it was not on “their radar screen.” Although the remaining half said there is moderate to high interest, these responses were often qualified. For example, one respondent noted:

“I mean, certainly if you asked any of them point blank and said would it be a good thing, they’d all say, ‘oh, yeah.’ But whether they’d be willing to then put resources behind it is a whole other issue.”—AUTOMOBILE MANUFACTURER, CORPORATE RELATIONS MANAGER

Many of the managers reported that they anticipate changes to their company’s volunteer programs in the next few years, such as a greater emphasis on signature projects, expansion of the program in sites or number of volunteers, and an increased monitoring of the program’s efforts and successes. Although few corporate leaders currently view retirees as an “untapped asset,” the fluidity of the programs may offer opportunities to advance this idea in the future.

Employee and Retiree Focus Groups and Surveys

Employees and retirees strongly agree that corporate America should provide greater leadership in promoting volunteerism.

Eighty-eight percent of those surveyed moderately to strongly agree that companies should play a role in educating employees and retirees about volunteer opportunities in the community. Similarly, 82 percent felt strongly that corporations also have a responsibility to mobilize community agencies to “retool” and create quality volunteer experiences that tap individuals’ expertise and talents.

A company website that provides access to information and resources about volunteerism in the community is the resource employees and most retirees agree would influence their participation in volunteering.

The vast majority expressed moderate to strong interest in volunteering through their current or previous employer if the company offered a website where volunteer agencies could post jobs (82%) or individuals could post their skills and interests (76%).

There is a demand for pre-retirement planning assistance that goes beyond a description of pension and health benefits to addressing the social and emotional aspects of this next stage of life.

Focus group participants and survey respondents indicate they want help preparing for a retirement that may involve transitions between work, volunteer, and leisure time.

The opportunity to take part in a pre-retirement workshop on volunteer opportunities is also a valued activity. Almost three-quarters (72%) of participants indicate that such an offering would increase the likelihood of their participating in volunteer activities with their company. Most of the companies surveyed, however, only offer information on retirement pension and health benefits (often through an 800 number) while few address broader life planning issues.

Services that expand or enhance retiree/alumni involvement should be an extension of current volunteer efforts; the vast majority of retirees don’t want to be in a segregated program.

Retirees and employees both articulated the importance of promoting volunteerism as a lifelong activity. Their advice to corporate leadership would be to introduce the notion of civic engagement during employee orientation and continue to weave it into the on-going fabric of the employee/company experience. Grow the core—and don’t lose them in retirement years.

This view of volunteerism as a lifelong experience contributed to very few respondents (10%) advocating the creation of separate volunteer programs for retirees. Many of the retirees in the focus groups emphasized a desire to see, visit, and volunteer not only with “fellow retirees” but also with younger colleagues and coworkers who remained employed by the company.

Currently only about one out of five employees surveyed had volunteered through the workplace in the past year, but interest in company volunteer programs may be increasing—Almost three-quarters (72%) of employees and retirees indicated Moderate to Very High Interest in pursuing volunteer activities through the workplace in retirement.

The majority of surveyed workers and retirees (62%) had volunteered in their communities in the past year, most often through schools, religious organizations,

and/or neighborhood groups. In fact, slightly more than half (55%) had volunteered once a month or more.

One of the barriers to volunteering frequently cited in the focus groups is the “time pressure” that individuals experience trying to balance family and work roles. The ability to volunteer through the workplace may offer some individuals the opportunity to more seamlessly fit these activities into their lives. Of particular importance may be company programs that allow employees paid release time for community service. Another identified barrier is the “lack of knowledge about available volunteer

“...what’s important is that a corporation look to mold an impression of volunteerism on an active employee, so that once they step into retirement, they can continue in that fold because they know we offer a fellowship, a networking opportunity. As a retiree, many of the younger retirees that I know, they look to volunteerism as one more way I can network to find another job. So volunteerism can also offer networking opportunity.”

—Northeast Communications Retiree; Focus group

“It’s important for all these ideas to be handed to a young, active employee so they understand what the value becomes later. It’s like retirement savings. Don’t think about it when you are 50. Think about it when you are 30 or younger. So the same holds true with volunteering. Recognize at 30 what volunteerism has to offer you, aside from the personal wealth that you gain. And that’s what a corporation needs to do.”

—Northeast Communications Employee; Focus Group

opportunities.” Company volunteer programs may offer some individuals an easier conduit into volunteerism and allow them to “test the waters.”

Intrinsic rewards are the primary motivators for employee and retiree volunteerism

When queried about incentives to encourage their volunteerism, employees and retirees most frequently identified the importance of opportunities that match their skills and interests (57%) or help them develop new skills and interests (40%).

In the focus groups, volunteers repeatedly spoke about the importance of “making a contribution” or “making a difference” and emphasized the joy they gain from the experiences as well as their increased sense of self-worth.

Another message—heard in both the survey and focus groups—is that individuals are seeking volunteer opportunities that offer flexibility in how and when they participate. Many respondents indicate they are stretched for time. There are many who said they plan to or are continuing to work in retirement and, therefore, have limited time to volunteer. Over half (57%) of the surveyed individuals felt the degree of flexibility in the volunteer arrangement would influence their decision to participate.

But one important motivator continues to be simply being invited to volunteer. “Some of the people that I know that don’t volunteer, it’s because they’ve never been asked...” (focus group utility employee).

Loyalty may be an important ingredient in strengthening corporate retiree volunteerism.

Despite a difficult economic climate in which businesses have experienced mergers and acquisitions, employee downsizing, and erosion of employee and retiree benefits, almost half of individuals surveyed rated the current relationship between their company and its retired workforce as good or better. One possible explanation for this generally positive view may be found in the comments from the focus group members. A number of individuals repeatedly stated that many of these changes simply reflect the “new realities” of the American workplace and felt their company had acted no differently or worse than others.

Yet, the bottom-line may be that few people within the companies are paying much attention to the issue of company-retiree relations. Offering responses similar to several of the corporate managers interviewed, 29% of employees surveyed feel they are unable to assess the nature of the company and retirees relationships and simply chose “don’t know” as a response.

Both business and retirees benefit when companies include retirees in their volunteer programs.

The majority of people surveyed clearly feel that both companies and retirees would gain through the inclusion of retirees in volunteer programs. From the business perspective, the inclusion of retirees allows companies to create larger pools of volunteers. The benefits also extend beyond sheer numbers: more than half of the surveyed individuals feel strongly that the use of retirees in volunteer programs would enhance the company’s image and reputation in the community. In focus group discussions, interest was expressed in using retirees as “ambassadors” for the company in the community. Many said a business case could easily be made for greater inclusion of retirees, as—unlike employees—there is no paid release time involved with the volunteering.

The majority of those surveyed also strongly agree that volunteering offers health benefits to retirees. In focus group discussions, volunteering was often described as keeping individuals active, creating social connections, and raising self-worth and self-esteem—all providing important physical and mental health benefits.

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IMPLICATIONS/CONCLUSIONS

Throughout the past several decades corporate volunteer initiatives have flourished and become established programs within the vast majority of large U.S. companies. Moreover, the recent resurgence of national interest in the promotion of civic engagement, as well as growing attention to the issue of corporate social responsibility, suggests that these volunteer programs will continue to expand in scope.

Although company volunteer programs represent a relatively small proportion of the total volunteerism efforts in local communities, these programs serve a valuable role as they send a message promoting participation of all sectors of society—including the business sector—in efforts to create healthy communities. Company volunteer programs are not only popular with corporate leaders and employees, but they are also well-received and welcomed by community leaders. Despite a dearth of rigorous research examining the value of volunteering, these initiatives are uniformly regarded as successful by employers, employees, and community agencies.

During this project we heard a strong and consistent message from employees and retirees that American companies should play an even greater role in promoting volunteerism. The survey data and focus group discussions revealed that within companies there is often a core group of individuals—estimated as ranging from 15% to 30% of employees—who are the “committed volunteers.” The question thus becomes one of “how to grow the core?”

The most common answers to this question focused on the importance of “education” and “outreach.” A large percentage of surveyed individuals feel that the ability to easily learn about existing volunteer opportunities and/or to connect with the volunteer programs is a significant factor in their decision to participate. Reflecting the growing use of technology, a high level of interest was expressed in the potential use of company websites as clearinghouses for individuals to match their interests and skills with the “right volunteer experience.” Company sponsored workshops on local volunteer opportunities were often identified as a “motivator” that would draw individuals into volunteerism.

We also heard that “growing the core of volunteers” will require reaching out to individuals throughout their work experience—from the entry into the company at orientation, throughout their career, and into retirement. For many, simply “being asked” is cited as an essential factor contributing to the initial decision to volunteer.

In the interviews with corporate managers of 22 national companies, it was discovered that approximately half of the companies currently have retirees involved in their volunteer programs; however, only a very few have strategically targeted or devoted resources specifically to retirees.

Although the majority of interviewed managers reported that they anticipate changes in their company's volunteer programs in the next few years, few identified outreach to retirees as part of the growth strategy for these programs.

In general, the research revealed that companies are not strategically linking the aging of the workforce and new definitions of retirement to company volunteer programs. Although the managers interviewed say that corporate leadership would be supportive of retirees' participation in volunteer programs, there is not a strong sense that, relative to other company priorities, leadership would devote attention or resources to building this connection.

In contrast to the managers interviewed, employees and retirees generally feel more strongly that retirees currently remain largely an "untapped asset" by

“They provide an extra set of eyes and ears, an extra pair of hands as volunteers in the communities; they're goodwill ambassadors. They have the ability to bring issues back into a company again through their community. They're kind of diamonds in the rough. For so long companies or employers in general have looked at retirees as just ‘Okay, we sort of used you up, here's your package, have a great rest of your life. But, I think there's two sides to that. We can tell them that but still keep them engaged.’”

—Midwest Utility, Community Affairs Consultant

American companies. In both the survey and focus groups, employees and retirees articulated the view that a strong “business case” could be made for building a greater connection between retirees and company volunteer initiatives. This business case extended beyond the fact that the sheer numbers of retirees could swell the company’s ranks of volunteers; rather, the targeted inclusion of retirees is seen as enhancing the company’s reputation and image in the community.

Preliminary evidence of this untapped potential among retirees can also be found in the fact that slightly more than two-thirds of the surveyed employees and retirees expressed “moderate to strong” interest in volunteering through the workplace in their retirement years. In fact, the cohort of employees interviewed indicate greater interest than retirees. One potential explanation for the rising interest is that the workplace is increasingly replacing geographic communities as the source of one’s friends and social interactions; often providing more personal connections than their neighborhoods. In fact, the most consistent message heard in the focus groups is that the workplace is a source of community; many current retirees have maintained ties not only with each other but with friends still in the workplace.

The aging of America’s workforce and the possible pending labor shortage is beginning to capture corporate America’s attention. For example, one emerging managerial issue is the phenomenon of “intergenerational conflicts” resulting from having—for the first time ever—four distinct generations with differing value systems in the workplace. The four generations are: traditionalists (born 1925-1945);

baby boomers (1946-1964); Generation X (1965-1980); and Generation Y (1980-on).

Few corporations, however, have focused on how a multigenerational workforce can provide a competitive edge in the marketplace. Preliminary evidence suggests that in the future a four—or even five—generation workplace may become commonplace as a large proportion of the baby boomer generation anticipates remaining in the paid workforce beyond the traditional retirement age of 65. Thus, midlife and older employees are increasingly finding themselves traveling in “uncharted waters” as they search for ways to transition between full-time paid employment and retirement.

Unlike their parents’ generation, many baby boomers are expressing a strong desire to combine paid and volunteer experiences as they age; what appears to be key is that the experiences offer opportunities for personal growth. Companies that value older workers and offer them creative and flexible arrangements may possess an advantage in both recruiting and retaining baby boomers. One such way that companies can demonstrate a valuing of their older workers is through strengthening the connection between corporate volunteer programs and the retired workforce; these programs may be a valuable resource for employees as they explore how to remain civically engaged in later life.

Corporate Models

Involvement of retirees in corporate volunteer programs is not a new concept. There are many companies that have a long history of engaging and supporting retirees in community involvement efforts. As this report highlights, the environment for volunteerism and, specifically, retiree involvement, is evolving. A few well-known and established corporate employee involvement programs that involve retirees include GE Elfun, Duke Energy, and General Mills.

In addition to those mentioned, we have highlighted a sample of corporate programs that represent different stages and levels of commitment to retiree volunteer involvement and provided a brief description along with contact information.

Bank of America

Integrating Employees and Retirees under a National Scheme

Team Bank of America, the company's longstanding and very successful volunteer organization, actively encourages retirees to work alongside current associates to serve local communities. The integrated volunteer network of the program promotes teamwork and professional development by bringing together employees and retirees to work on volunteer projects that range from raising money for AIDS charities to mentoring in public schools. Retirees provide the program with their expertise about the company and the banking industry. Bank of America volunteers represent a variety of locations, levels, and business units. The company tracks the involvement of employees based on the number of hours and

“The role that corporations play in fostering service and civic engagement may be the single most powerful untapped force for positive change in this country.”

—Robert L. Nardelli, CEO, The Home Depot,
December 2, 2004

activities. Retiree volunteer hours are currently not individually recorded, but the hours they contribute to company events are included in tracking those group hours. Local Bank of America volunteer team leaders communicate about group volunteer projects and other local volunteer opportunities to retirees through mailings, newsletters, and email. For more information on the efforts of Team Bank of America, please see www.bankofamerica.com/tembank/.

San Diego Gas and Electric

Strengthening the Connection to Retirees

Currently, retiree volunteering at San Diego Gas & Electric (SDG&E), a Sempra Energy utility, is coordinated through the SDG&E Alumni Association, a largely social organization. An SDG&E Alumni Association board member

“I like the idea of companies maintaining a communication with retirees through volunteerism. I think it would help employees transition to retirement and still feel needed. I also think it will help retirees stay healthier and happier because of the sense of belonging and giving back to the community.”

—West Coast Utility Employee,
Survey Respondent (female, 45-49)

chairs a committee that pursues volunteer opportunities and requests. The majority of volunteer participants are association members and many have served on the association board. The association also works with Volunteer San Diego to identify opportunities for retired employees to become more involved with their communities. SDG&E often hears about retirees’ involvement anecdotally and is working with the association to capture the retired employees’ volunteer efforts.

Through the monthly meetings and a close relationship with the Alumni Association board, SDG&E will look to the volunteer chair to assist in this effort. Increasing communication with association members through the volunteer committee can aid in collecting the members’ volunteer efforts. To learn more about SDG&E’s community activities and for information about its programs and services, go to: www.SDGE.com.

State Street Corporation

Establishing a Separate Program

The Spirit of State Street Alumni Volunteer Program is a relatively new initiative at the Boston-based global financial services company. After formalizing an employee volunteer program in 2001, State Street made a strategic decision to create a separate program for retirees and former employees based on expressed interest to reconnect with past colleagues. The company strives to create appropriate opportunities for the alumni program and considers issues such as transportation and physical limitations when choosing projects. The program is driven by a leadership council of dedicated alumni and the company provides financial and administrative support. Since the program is in its beginning stages, State Street is looking to improve upon recruiting strategies and communications with alumni. Alumni have participated in a variety of projects including sorting toy and clothing donations for less advantaged children and providing assistance at a local food bank. For more information about the program, visit: www.statestreet.com/alumni/.

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Verizon and the TelecomPioneers

Integrating and Tapping Resources Across an Industry

The TelecomPioneers have been bringing telecommunications' industry employees and retirees together for more than 90 years. Originally conceived as an organization for individuals who wished to preserve the history of the telephone industry, the TelecomPioneers now focus on serving their communities through volunteering. Although length of service with a company that sponsors the TelecomPioneers used to be a consideration for membership, today the organization welcomes all employees, regardless of time with their sponsor company. Verizon's branch of the TelecomPioneers currently has over 30,000 employee members and 100,000 retiree members and includes chapters throughout the United States. The chapters focus on local community service projects, emphasizing education and literacy. Verizon TelecomPioneers provide significant support for company-sponsored events, particularly those associated with Verizon Reads, a nationwide program dedicated to helping people in this country who are striving to improve their level of literacy. Last year, Verizon TelecomPioneer members contributed over 2 million hours to their communities as volunteers. Verizon supports its retirees' volunteer efforts by making an annual grant to the TelecomPioneers through its Verizon Volunteers Program. Verizon Volunteers is one of the largest corporate volunteer programs in the United States. In addition to supporting contributions of time and talent, the program also encourages retirees' monetary donations by providing matching gifts to accredited colleges and universities,

and PBS radio and television stations that retirees support. For more information about Verizon retirees' involvement in the TelecomPioneers, please go to: www.verizonpioneers.org.

Xcel Energy

Keeping Communities Strong

Volunteerism at Minnesota-based Xcel Energy has always been part of the corporate culture. The company is proud of its presence in the community, which includes strong support for a United Way campaign, a large number of executives on community boards and high employee involvement in its Corporate Sponsored Volunteer Programs. The company extends its commitment to the communities it serves by actively encouraging retirees to stay connected to its volunteer efforts. Xcel Energy's volunteers are active in the company's volunteer partnership with the Salvation Army and many other organizations. Retirees, however, have created their own signature program that allows them to utilize their years of experience and expertise. Through the Kitchen Appliance Marking program, retiree volunteers make appliances safer and more user-friendly for the company's visually impaired customers. For more information about Xcel Energy's volunteer efforts, please go to: www.xcelenergy.com/XLWEB/CDA/0,3080,1-1-1_4359_15652_15742-13017-0_0_0-0,00.html.

IBM

Creating New Solutions and Opportunities through Technology

By extending its On Demand Community Volunteer Initiative to retirees in 2004, IBM has been able to engage retirees in volunteerism in a new way. The

program gives its approximately 160,000 retirees access to technology tools that can be used in schools and local agencies world wide. Available tools include educational resources for classrooms and after-school programs, new technologies that allow senior citizens and the disabled to see the internet better, and assessment methods that can be used by nonprofits to develop technology plans. On Demand allows IBM retirees and employees alike to utilize cutting-edge company resources to enhance community organizations with which they are already involved. By including retirees, the company expects that the number of On Demand volunteers will increase from 15,000 employees to 50,000 employees and retirees in 2005. For more information about IBM's On Demand program, please see the company's press release at: www.ibm.com/news/us/2004/06/301.html.

Cargill

Involving Others in a Dedicated Retiree Program

Senior Retirees Investing Career Expertise (SPICE) is food and agricultural product provider Cargill's long-standing retiree volunteer program. Since 1985, the program has been based in the company's headquarter community of Minneapolis, MN and is open to all Cargill retirees and their spouses. A 19-member steering committee runs SPICE and the public affairs department at Cargill offers administrative support and strategic oversight. SPICE tracks its members' volunteer hours to help with Cargill's measurement needs regarding their community involvement programs. SPICE works collaboratively with the Cargill Cares Volunteer Council (CCVC), the headquarters-based employee volunteer council, on many volunteer initiatives and the annual Cargill Volunteer Fair and Recognition event. For example,

two SPICE members serve on the board of the CCVC and a CCVC member sits on the SPICE board. The group participates in a range of activities and currently has a network of almost 1,500 retiree volunteers, with over 350 active participants. For more information, please go to: www.cargill.com/about/citizenship/spicehtm#TopofPage.

Johnson & Johnson

Connecting Retiree Volunteerism to Company Values

Retiree volunteerism at Johnson & Johnson is largely supported through the company's extensive retiree club system. With a small stipend from company headquarters, regional clubs sponsor volunteer events based on the interests of their respective members. Retiree clubs have allowed company retirees to come together on an informal level for many years, but Johnson & Johnson has noticed that its employees are increasingly seeking more meaningful connections after they leave the company; they want to be engaged, not just active. The company culture has long emphasized a familial connection within the corporation and retirees' desire to continue interacting with the company is a testament to the meaningful connection they develop because of that culture. Many retirees are already involved in company-sponsored walks and runs for various causes; Johnson & Johnson plans to reach out to retirees to join other group volunteer projects in order to more fully integrate employees and retirees. For more information about Johnson & Johnson's engagement efforts, please see the company contributions report at: www.investor.jnj.com/visitors/dynamicdoc/document.cfm?CompanyID=JNJ&documentID=660&PIN=&resizeThree=no&Scale=100&Keyword=\type%20Keyword520Here&Page=34.

“Sometimes I find in talking to some of my friends that have retired, they want connectivity. It doesn’t have to be an anniversary party or that employee appreciation day, but they want connectivity. So if we connect them via retirement volunteer projects, I think they would be very receptive because they don’t like the feeling of: you retire and you’re disconnected.”

—Midwest Insurance, Corporate Relations Manager

Boeing

Supporting an Established Retiree Program

Boeing supports several retiree volunteer programs from different parts and regional areas of the company. One of the company’s largest and most active retiree organizations is the Bluebills, which involves more than 2,000 former Boeing employees and their spouses. The organization was established in 1995 and continues to thrive as Boeing’s largest and most active retiree group. The majority of Bluebills’ projects serve the Puget Sound where the company has its largest U.S. presence. The organization’s Kids in Need initiative, in partnership with World Vision and School, Home and Office Products Association, has become its signature project. The program provides school supplies to those children most in need in western Washington. For more information about the Bluebills, please go to: www.bluebills.org.

Booz Allen Hamilton

Involving Alumni

Because of the nature of its consultancy-based business, many Booz Allen Hamilton employees seek career opportunities in other fields rather than actually retiring from the company after a lifelong career. However, the company is committed to keeping its alumni connected and volunteer initiatives play a big part in ensuring a continuing relationship. Many Booz Allen alumni remain active in group volunteering projects after they have moved on from the company. The company has found that continued involvement often emerges organically; participating alumni still have connections to the company, or often, to the specific volunteering project. Booz Allen Hamilton leadership puts a great deal of emphasis on ensuring that alumni leave with a positive impression of the company and considers its volunteer efforts a major part of managing that relationship. For more information about programs for alumni at Booz Allen Hamilton, please go to: www.bah.com.

RESOURCES

Additional information on issues related to employee volunteer programs, retiree volunteering and civic engagement of older Americans are provided by these publications and websites.

Publications of The Center for Corporate Citizenship at Boston College:

2004 Community Involvement Index. 2005.

Corporate Volunteerism: Essential Tools for Excellence. (forthcoming in 2005).

In Focus: Employees—The Core of Corporate Citizenship. May 2005.

Measurement Demystified: Determining the Value of Corporate Community Involvement. 2002.

Other Publications

Appealing to Experience: Zeroing in on the Right Message. Washington, DC: Experience Corps. 2005. This report can be downloaded at: http://www.experiencecorps.org/images/pdf/EC_tlkt_final.pdf

Upsizing Community Investment: Building a Successful Retiree Volunteer Program. Ottawa: Volunteer Canada. 2005. This report can be downloaded at: <http://www.volunteer.ca/volunteer/pdf/Manulife.pdf>

50+ Volunteering: Working for Stronger Communities. Washington, DC: Points of Light Foundation. 2004. This report can be downloaded at: <http://www.pointsoflight.org/downloads/pdf/networks/olderadult/WorkingForStrongerCommunities.pdf>

Reinventing Aging: Baby Boomers and Civic Engagement. Boston: Harvard School of Public Health. 2004. This report can be downloaded at: <http://www.hsph.harvard.edu/chc/reinventingaging/Report.pdf>

Multicultural Study 2003. Time and Money: An In-Depth Look At 45+ Volunteers and Donors. Washington, DC AARP. 2003. This report can be downloaded at: <http://www.aarp.org/research/referencelpublicopinions/aresearch-import-498.html>

Experience At Work: Volunteering and Giving Among Americans 50 and Over. Washington, DC: Independent Sector and AARP. 2002.

Recasting Retirement: New Perspectives on Aging and Civic Engagement. San Francisco: Civic Ventures and Temple University Center for Intergenerational Learning. 2002. This report can be downloaded at: http://www.civicventures.org/fileadmin/cv_files/Publications/REcasting.pdf

The State of Knowledge Surrounding Employee Volunteering in the United States. Washington, DC, Points of Light Foundation. 2004. This report can be downloaded at: <http://www.pointsoflight.org/downloads/pdf/resources/research/StateOfKnowledge.pdf>

Making a Business Case for Employer-Sponsored Volunteerism. Ottawa: Volunteer Canada. 2004. This report can be downloaded at: www.volunteer.ca

“...I think they see that enthusiasm by our retirees, that energy level, and that sense of pride about their company. I think that’s a good thing to mirror back to our employees.”

— Midwest Utility, Community Affairs Consultant

Hart, Peter. **The New Face of Retirement: An Ongoing Survey of American Attitudes on Aging.** San Francisco: Civic Ventures. 2002. This report can be downloaded at: http://www.civicventures.org/fileadmin/cv_files/Publications/2002_survey_analysis.pdf

Lindblom, D. **Baby Boomers and the New Age of Volunteerism.** Washington, DC: Corporation for National Service. 2001. This report can be downloaded at: <http://www.nationalserviceresources.org/filemanager/download/465/lindblom.pdf>

Mathieu, M. G., Charlotte Coker Gibson, and Jennifer Kim. **Developing Excellence In Workplace Volunteer Programs: Guidelines for Success.** Washington, DC, Points of Light Foundation. 2004.

Websites

AARP

www.aarp.org/

The Center for Corporate Citizenship at Boston College

www.bc.edu/corporatecitizenship

Civic Ventures

www.civicventures.org/

National Council on the Aging

www.ncoa.org

Points of Light Foundation

www.pointsoflight.org

Volunteer Canada

www.volunteer.ca

Volunteers of America

www.volunteersofamerica.org

The Corporate Informant Interviews

The sample of 22 companies was derived primarily from the 350 corporate members of The Center for Corporate Citizenship at Boston College. In constructing a sample, we purposely selected companies whose headquarters were located in all regions of the country—Northeast, Southeast, Midwest, and West Coast—and that represented a variety of industry sectors (i.e., financial services, telecommunications, manufacturing, pharmaceutical). We also sought out companies which had a significant number of older workers. Of the approximately 50 companies contacted, 22 (44%) agreed to participate.

Within each of the 22 companies, we identified the person or persons with whom it would be most appropriate to conduct the interview. Company volunteerism was most frequently housed within corporate relations or community relations departments. Ultimately, telephone interviews were conducted with 30 persons within the 22 organizations. Most often when two individuals were interviewed within a single company, it was conducted as a joint interview.

The interviews were conducted by the project director, using a structured interview guide which consisted of both close- and open-ended items. Prior to beginning the interview, oral informed consent and permission to tape was obtained. The interviews ranged in length from 45 minutes to two hours; the average interview length was one hour. In a few cases, when participants did not know a particular answer, information was later emailed to the project director. All taped interviews were transcribed for data analysis

purposes. Close-ended items were coded and analyzed using SPSS.

Employee and Retiree Focus Groups

Each of the 22 companies which participated in the key informant interviews were asked about their interest in having their older employees and recent retirees take part in a focus group on volunteerism. Three companies were able to offer their organization as a focus group site during the project's relatively short time frame:

Company 1: A Northeast Fortune 10 communications company.

Company 2: A Southeast Fortune 500 financial services company.

Company 3: A West Coast regulated public utility that is a subsidiary of a Fortune 500 energy-services company.

Two focus groups were conducted at each site; one group for older workers or pre-retirees and a second group for recent retirees. We also sought as much as possible to ensure that the groups included management and non-management individuals as well as persons with and without histories of volunteerism. Each of the three sites adapted the recruitment strategy to fit their organizational cultural and constraints. Ultimately a total of 48 persons—31 employees and 17 retirees—participated in the six focus groups.

All focus groups were conducted by the project director and aided by a research assistant who observed the groups and took notes. Prior to

“It seems to be like there is a whole group of people out there who need to be worked with to give some ideas about how they could be used meaningfully...very little discussion is made about how you use your time in retirement.”

—Northeast Communications Employee; Focus Group

beginning the focus groups, participants read and signed a consent form. A structured interview guide consisting of open-ended questions tapping 10 core themes was used.

The focus groups were two hours in length. The actual discussion was one and one-half hours in length while the completion of the informed consent (prior to discussion) and the background questionnaire (post-discussion) entailed an additional one-half hour. All focus groups were tape recorded and later transcribed for data analysis purposes.

Employee and Retiree Survey

All of the 22 companies that participated in the key informant interviews were also asked about the possibility of conducting a volunteerism survey with a sample of their older employees and recent retirees. Four companies were able to offer their organizations for such an endeavor within the project's time frame. (Three of these four companies were also sites for the focus groups.)

Company 1: A Northeast Fortune 10 communications company.

Company 2: A Southeast Fortune 500 financial services company.

Company 3: A West Coast regulated public utility that is a subsidiary of a Fortune 500 energy-services company.

Company 4: A Northeast manufacturer of health care products, as well as a provider of related services.

A four-page survey questionnaire consisting of close-ended questions (e.g., Likert-scale items) was constructed to examine individuals' opinions about and experiences in volunteering as well as to gather demographic data. Pilot testing revealed that the survey could be completed in approximately 15 minutes.

value

All four sites used the following “packet” of materials to recruit individuals:

A cover letter from the principal investigator, detailing the survey’s purpose and respondent anonymity;

A letter from company leadership encouraging participation;

A preaddressed, stamped envelope allowing individuals to return the completed survey; and

A post-card to enter a drawing for one of fifteen \$50 American Express gift certificates, providing an incentive to participate.

Each site adapted the distribution method to fit their organizational structure and culture—including the use of mail and/or email options. Estimated response rates ranged from 20 to 28%. Across the four sites a total of 1,502 surveys were received via mail and website. In order to reflect the age parameters of the boomer generation (1946-1964) our data analysis focuses on respondents aged 40 and older (N = 1,096). For statistical analysis the data were entered into a SPSS file.

Methodological Limitations

The findings of this study should be regarded as preliminary and interpreted with caution for several reasons. First, the 22 surveyed companies have an affiliation with The Center for Corporate Citizenship at Boston College. It is important to note that these companies may share a stronger sense of corporate social responsibility than many other companies. Second, the focus group participants were “volunteers” and not randomly selected. Indeed, people who self-select to participate in a focus group on volunteerism may have a stronger connection to the issue of civic engagement. Third, the response rate to the survey ranged from 20 to 28%; thus, we only heard from a small portion of employees and retirees within the companies. Despite these methodological limitations, this pioneering study represents the first systematic investigation linking the issue of corporate volunteerism to the retirement trends and civic engagement preferences of the baby boomer generation.

“Retirees are an under-utilized resource which could be better leveraged for the improvement of all involved. The trick is to make it flexible and easy for them to get engaged.”

— Southeast Financial Services Employee, Survey Respondent



THE CENTER
FOR CORPORATE
CITIZENSHIP
AT BOSTON COLLEGE

The Center for Corporate Citizenship at Boston College

Wallace E. Carroll School
of Management
55 Lee Road
Chestnut Hill, MA 02467-3942

T (617) 552-4545

F (617) 552-8499

E ccc@bc.edu



Volunteers
of America®

Volunteers of America

1660 Duke St.
Alexandria, VA 22314

T (703) 341-5000

(800) 899-0089

F (703) 341-7000

E info@volunteersofamerica.org