

Marketing Volunteer Opportunities to Baby Boomers:

A Blue Print from the Field

Submitted by:

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Biographical Information

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Abstract

The world of senior volunteerism is undergoing a transformation of unprecedented proportions driven by the greatest demographic shift in our nation's history, the baby boomer generation. How will the baby boomers impact organizations which have used senior volunteers to fulfill community need? This question was addressed in one of the conference tracks offered at all five of the Corporation for National Service Senior Corps Cluster conferences held across the United States in 2001. Over 300 project directors and sponsoring organizations responded to seven planning questions to create a blue print for marketing volunteer programs to baby boomers. The blue print ideas are presented as a framework to help individual community organizations begin their own planning.

Marketing Volunteer Opportunities to Baby Boomers: A Blue Print from the Field

Introduction: Why Think About Baby Boomers Now?

The world of senior volunteerism is undergoing a transformation of unprecedented proportions driven by the greatest demographic shift in our nation's history. In the year 2000, there were 34.7 million individuals 65+ with that number expected to double by the year 2030 (U.S. Census Bureau, 2000). This explosive shift in our population will have an enormous impact on our socio-economic infrastructure, virtually transforming every aspect of American life. The question that confronts all of us as organizations and individuals is how prepared are we to recognize, adapt and integrate these changes into the fabric of our programs? How will we respond differently? What new resources are needed? What actions or policies will be needed to attract and retain a new generation of volunteers?

The issues of senior volunteerism are complex requiring organizations to rethink its organizational structure, its corporate values and to reframe its message to effectively market its programs, services and volunteer opportunities to a new generation of baby boomers. Don Spieler, 64, who had been President of Kodak's operations in Mexico sought to become actively involved in the community as a volunteer. What he found was disappointing. Spieler said, "I found an entrenched group of agencies that did not accept the skills I could provide for them." (Tanz Magazine, 2000) While Spieler may not be your typical volunteer his message is unmistakably clear. If organizations are going to attract and retain a new generation of baby boomer volunteers whose education

levels are higher than that of previous generations, are individualistic in their thinking and are looking for meaningful roles, then status quo thinking must be replaced with new internal and external paradigms of operation.

Who are the baby boomers, what do they want, and what can we expect in relationship to our volunteer programs? The answer is partially revealed through images that develop into a picture of diversity and individualism. The impact of baby boomers has been a readily identifiable, high impact phenomenon on society since the 1940's, the beginning of the baby boomer generation. In the 40's we saw dramatic increases in housing starts, in the 50's massive schools were built, in the 60's we witnessed numerous college protests, in the 70's millions of new jobs were created, in the 80's organizational structures were redefined and in the 90's significant investments in the stock market; all fueled by the baby boom generation (Keefe, 2001).

From a demographic perspective, the numbers provide a wake-up call to action. Today, 34 million people or nearly 13 percent are 65+. This number rises to 40 million by the year 2011 (U.S. Census, 2000). It is at this point that the first wave of 77 million baby boomers begin to turn 65. By 2030, one in every five Americans will be over the age of 65. Longevity rates continue to increase with medical advances and more active lifestyles. This extension of life means more years in retirement, more time for leisure and volunteer activities and the likelihood of more need for community-based support and intervention services that support and sustain independent living.

But Will Boomers Really be Available to Volunteer?

Impacting the potential pool of baby boomer retirees is the coming labor shortage, a fact well documented by numerous studies and research projects. According to Keefe (2001), there will be 80% fewer net new workers in 2010 than in 1970 with an anticipated labor shortage for twenty years. As a result, retirees are expected to make multiple entrances and exits in the labor market. The Cornell Retirement & Well Being Study (Moen, 1999) provides a variety of reasons why retirees continue to work after their official retirement. Seventy-three percent had free time; 56% to maintain professional contacts; 68% for social contacts; 63% for additional income and a staggering 89% to keep active. What does this tell us about the future of volunteerism? According to the study, 60% of older adults say that “feeling valued and needed” is important for personal fulfillment and 53% talk about the need to be intellectually challenged. Volunteer options will compete with work and leisure opportunities in an unprecedented way. Are volunteer and community-based agencies ready to respond to this challenge?

These questions and others were the focus of five conferences around the United States sponsored by the Corporation for National Service, the federal organization responsible for senior volunteerism (e.g., Retired & Senior Volunteer Program, Senior Companion Program, Foster Grandparent Program) and community service. These five conferences, referred to as “Cluster Conferences” had the theme *“Tapping Senior Power: Community Partnerships That Work”*. The conferences were unique in that for the first time, both project directors and sponsoring organizations were brought together to discuss the future of senior service and to find new creative ways to

harness the skills, experiences and energies of a new generation of senior volunteers. Tess Scannell, Acting Director, National Senior Service Corps said “the new generation of seniors is revolutionizing retirement and has the potential to transform America”.

These attendees participated in intensive dialogues and provocative strategizing sessions. The conferences were organized into five tracks, one of which focused exclusively on the baby boomer. The results of work sessions at these conferences regarding how organizations can best ready themselves for the next generation of volunteers are reported here and become a blueprint for action for other agencies and a starting point for shaping individual organizational responses.

Methods

In Fiscal Year 2001, The Corporation for National Service Senior Corps conducted annual training for the Foster Grandparent, Senior Companion and Retired and Senior Volunteer Programs through regional meetings held in five geographic clusters. The plan to decentralize training included the intent to involve not only Senior Corps grantee project directors in the conferences, but also to involve sponsor executives from the agencies where Senior Corps programs are based. The overall conference goals included: sharing the vision of the future of senior service and securing a commitment among all partners to common strategies to expand senior service; providing sponsor executives and project directors with opportunities to share ideas and effective practices in meeting community need; and facilitating teambuilding among participants.

The five cluster meetings took place from April through July of 2001. The meetings were held in Los Angeles, California; Greensboro, North Carolina; Albuquerque, New Mexico; Milwaukee, Wisconsin; and Philadelphia, Pennsylvania. Each meeting had the same standardized and uniform training agenda and curriculum for

the two and one-half day meetings. There were five training tracks, each with a specific topical area chosen by a conference planning group and each with a lead technical assistance group. One of those tracks, *Preparing for an Aging America: Attracting and Retaining the Coming Wave of New Volunteers*, provided a framework for the data collected and reported on here. This track consisted of three separate sessions: an overview of the impact which baby boomers will have on the work force and on volunteerism, a dialogue on the diversity of the baby boomers and what that will mean to volunteer recruitment, and an interactive session on marketing to baby boomers in order to recruit volunteers in the future.

The third session in this track was entitled *Marketing to Baby Boomers: A Blue Print*. Total attendance at this session for the five cluster conferences was 375 Senior Corps program directors and sponsoring agency executives. Each session began with an overview of the demographic changes which baby boomers will bring to volunteerism. In addition, the differences between the baby boomer generation and the generation which precedes them was discussed including work ethic, leisure, success, shared experiences, finances, and the implications of these differences for marketing volunteer opportunities. After this presentation, small groups of 8-10 conference participants were assigned to work together to design the next generation human service centered organization; an organization which would be effectively structured to attract and retain baby boomer volunteers. The groups were given one or more of the following topics and related questions to respond to:

1. Organization Strategies: How might organizational strategies change? What strategies might you consider implementing? Outline a new strategic approach to address the next generation of volunteers.

2. Organization Structure: What kind of structure will attract and retain the next generation of volunteers? Describe the ideal organizational structure for tapping the market and making the best use of the new generation of volunteers.

3. Organization Resources: What resources will enable you to attract and retain the next generation of volunteers? Think broadly.

4. Organization Technology: How can you use technology in new ways to attract, retain and support the work of the next generation of volunteers?

5. Organization Funding: How can funders and/or investors play a role in attracting and retaining the next generation of volunteers? What roles might the volunteers play with respect to funding? How might you attract funding partners with new visions for volunteers?

6. Organization Partnerships: How will your external community relationships change? Can you imagine new network strategies, partners, and partnership roles that might be created? How will these attract and retain the next generation of volunteers?

7. Organization Culture and Values: How might organization cultures and values be affected in light of what we know about the next generation of volunteers? Will the way work is structured and conducted change in order to attract and retain the next generation of volunteers? What changes can you anticipate?

Each small group was asked to write down their responses to their topic and to prepare to summarize their discussion for the other small groups. The shared thinking of these 375 participants, all directly or indirectly engaged in senior volunteer programming in community based agencies, created the basis for this field-based blue print on what organizational shifts might be essential for agencies to make volunteer opportunities attractive to baby boomers. In order to create the blue print, the written materials submitted by the small groups at each of the five cluster conferences were integrated under the seven topical areas assigned to the small groups to gather their input on essential factors in the next generation human service centered organization: strategies, structure, resources, technology, funding, partnerships, and culture and values. Common themes and issues were categorized based upon both the written materials created by the small groups and notes taken by workshop facilitators during the oral presentations made by each small group. Each of the five workshops concluded with the presentation of several demonstration models which had

been tested as possible methods of recruiting baby boomers as volunteers.

Findings: Agency Staff Nationwide Create a Blue Print

The national participants in the five workshops gave input into the directions in which they believed their own and similar organizations might need to focus in order to attract and retain older volunteers to work with them in the future. The integration of the findings from the five conferences is reported under the seven functional categories of an organization:

Organizational Strategies

When responding to the question concerning which strategic approaches might need to change in an organization in order to attract the next generation of volunteers, all five conference groups respondents started with the very visible building block to marketing programs, the names of the programs and the terminology used to describe volunteers.

Organizational Strategy One was to change the image of aging. For a volunteer organization this was defined as needing to do two key image-oriented tasks: 1) help to create new perceptions about the capacities of adults over the age of fifty by providing opportunities to effectively use their time and talents and 2) respond to the known characteristics and priorities of baby boomers. The first approach suggested to respond to these image changing tasks was name changes. Programs were seen as less attractive to baby boomers which had the words older, senior, or retired in their titles. Similarly, using older or senior as a way to describe a volunteer was seen as less likely to attract boomers to make a volunteer commitment. The participants saw the need for both public and private programs and sponsoring agencies to adopt an image changing strategy by addressing the need to change names and labels. The second approach for image changing was to refine the volunteer experience to reflect a more challenging, meaningful set of experiences which can make a definable difference in the community. Such changes were seen as impacting not only the

potential baby boomer volunteers but also the perceptions of the community at large.

Organizational Strategy Two is to repackaging the way volunteer opportunities are presented. One suggestion for doing this was to change the whole concept of asking someone to volunteer. The participants presented the need to remove many of the distinctions between the paid and unpaid workforce, thereby focusing on the work to be done and the skills needed to accomplish that work rather than remuneration. Individuals would not be asked to volunteer, they would be asked to apply their skills to a particular task which needed to be done to meet a community need. Participants suggested the possibility of reducing the use of the word volunteer as a part of this strategy. As a part of the repackaging, volunteer positions would need to be designed and managed more like paid positions. This would include more challenging job descriptions, better training and supervision comparable to that received for paid positions, and a more carefully considered benefits package.

Organizational Strategy Three is to place new emphasis on the needs and characteristics of the future volunteer. Small group participants reported that their organizations have been focusing on volunteer tasks which they wanted completed and not on the skills and interests of the potential volunteer. Organizations would have to rethink the match between the volunteer and the task. They would have to show the potential volunteer the personal and community impact which this volunteer opportunity could afford them. Bureaucratic tasks might need to be minimized in order to attract volunteers with high skills. Volunteer opportunities would need to be paired with educational or part-time work programs to maximize response from boomers.

Organizational Strategy Four was to plan new approaches to find volunteers. Strategies which have worked in the past were not seen as viable for the future. Using high profile media and technological means to advertise opportunities were seen as essential. In addition, participants recommended not waiting until boomers retire in order to actively plan for recruitment. They

suggested going to corporations now and working on a variety of approaches to create viable programs. These might include part-time work and part-time volunteer packages, corporate volunteer release time for pre-retirees, and second career preparation and training through volunteer education and work.

Organizational Structure

The second area to which small group participants responded was the question of what the ideal organizational structure would be in order to tap the next generation of volunteers. The first component of organizational structure the groups defined was changes in the power structure and ordering of the hierarchy in order to better reflect the importance of volunteerism in the overall structure of the organization. This would involve elevating the stature of volunteer coordinators and volunteers in the overall organization. The second component of organizational structure needing change was the identification of a volunteer career ladder. Groups indicated that more effort needed to be made to look at increased levels of responsibility and incentives in order to both attract and retain volunteers in the future. The third component of organizational structure is to remove as many barriers to volunteering as possible. This meant creating a flexible and broad range of opportunities. A variety of opportunities would include some involving ongoing service and others more time limited, removing income and age guidelines, improving access to information on an ongoing basis through technology, and providing opportunities to volunteer with groups, couples, families, grandchildren, friends, and teams in many geographic locations. The fourth component of organizational structure was to think of better ways to integrate the existing agencies into societal structures already attractive to boomers. This might be translated into bringing volunteer opportunities or training where potential volunteers are located such as the workplace, church, or college and creating life long continuity of opportunities in all of these locations as well as intergenerational frameworks.

The fifth area of organizational structure was that of creating adequate and permanent feedback systems. The participants recommended creating forums for ongoing input into the organizational structure by its volunteers. They also recommended including volunteers in the redesign of structures and incorporating input from baby boomers in this process. Lastly, small groups also wanted feedback systems to include the recipients of service. As baby boomers will also become recipients of service as either caregivers or those in need, responding to the changing perceptions about service delivery from the perspective of the recipients should be built into any structural changes.

Organizational Resources

The groups were asked to think broadly about what resources would be necessary in order to attract and retain the new generation of volunteers. They responded with seven categories of resources that would facilitate the task. Two of these categories are detailed more completely in later sections of the findings, using the best available technology and creating corporate and community partnerships. Other resources needed included new sources of funding. Groups thought this might entail an effort to get more private sector foundations and other federal agencies interested in the areas in which volunteers might have an impact. A lead agency or agencies might be needed in order to spearhead national level funding. Demonstration grants and awards for innovation were two additional kinds of resources organizations might need. Participants indicated that these incentive approaches could provide the catalyst to new and essential programming efforts and the means to test them while maintaining current, workable structures. Again, a lead agency would be important in creating such opportunities and managing them.

A theme related to the resources already identified was that of leadership. Having the resource of effective leadership in order to make new organizational structures work was relevant in both the paid and unpaid leadership categories. As noted above, having funding agencies or associations which could advocate for monetary

resources and awards would facilitate many of the resource needs already identified. In addition, participants thought that more resources would be necessary to attract and retain volunteer leaders who would be essential to the future volunteer efforts. Resources needed might include titles for these volunteers, business cards, training, access to meetings, conferences, and retreats, and some level of authority.

In addition to resources that might help retain volunteer leaders, there were other resources that might help to retain volunteers more generally, specifically volunteer benefits. These might include transportation for the volunteer to get to and from assignments, Medigap insurance, housing options, and life long learning opportunities. Without these types of resources, participants thought that agencies in the future would not be able to compete effectively with other work and leisure opportunities available to baby boomers.

Technology

While technology has been a theme in most of the preceding areas, more details were elaborated upon as groups responded to the question of how technology could be used in new ways to attract, retain and support future volunteers. There were several areas associated with technology which all five cluster conference workshops saw as essential. The first was availability of hardware. Without adequate hardware for nonprofits which was accessible to the volunteer units, growth in volunteerism would be inhibited. In addition, hardware needed to be widely accessible in homes and communities as a means of reducing barriers for low and moderate income populations and the disabled. As volunteer opportunities and activities become more Internet driven, every attempt should be made to make computers available to both programs and potential volunteers.

A second set of technology issues revolved around the use of the Internet. The conference participants were interested in a wide variety of Web related activities. A clearinghouse of volunteer opportunities available both nationally and internationally would

enable boomers to volunteer wherever they are or where they wish to be. Knowing what is available and being able to apply or list opportunities online was viewed as important for both agencies and volunteers. Websites need to be developed, maintained, and be user-friendly for many of these technology activities. The Web also could be set up as a means of ongoing input into the structure and function of volunteerism, creating a vehicle for continuous total quality improvement.

Technology as a volunteer incentive was a third category indicated by the small groups. Organizations need to recognize both the growing computer skills of future volunteers and the ongoing interest in technology by these future volunteers. Access to Internet or free email accounts might serve as a relevant incentive. Access to training to upgrade computer skills and the state of the art changes could help keep volunteer skills polished and enhance the potential for future paid employment, if this was desired or necessary. The Internet could be used as a way for volunteers to communicate with each other. This networking would enhance social interaction and might prolong volunteer enthusiasm and commitment.

The last technology category is recruitment of technology experts as volunteers. With the strong emphasis on technology only growing in the future, conference participants stated that the organization of the future would need volunteers with this expertise on boards, councils, and in leadership positions. These kinds of opportunities were seen as flexible, creative, and meaningful volunteer opportunities which also could be done through virtual volunteering from any location.

Organizational Funding

Participants were asked to address a series of questions about how funders might play a role in attracting and retaining the next generation of volunteers. While a few of the responses are reflected in the Organizational Resources section above, a number of other concepts were detailed. First, corporate partnerships were seen as essential, particularly partnerships with organizations which would

be targeting boomer spending and would therefore have a particular interest in how their organizations were perceived by boomers. Partners could help create new incentives for boomer volunteers such as credit card promotions for rewards, frequent flyer miles, fee reductions for services based on volunteer hours, exchange of gifts for volunteer hours, and educational benefits.

Second, matching funding interests with boomer capacities would create opportunities for volunteers to play a significant role in fundraising. Volunteers with specific interests, personal connections or corporate ties could make approaches to funders based on their demonstrated capacity, enhancing the likelihood of funding. Volunteers could be trained as fundraisers or recruited because they already had this expertise.

Third, impact evaluation was seen as an important tool for both agencies and potential funders in enhancing the ability of organizations to attract volunteers in the future. Agencies were seen as needing to participate in research and evaluation which would influence funders and donors by showing the ways in which their volunteers impacted the community. Volunteers were seen as possible leaders or assistants in conducting evaluation. Being able to demonstrate the impact of volunteer opportunities was also seen as an important way to attract new volunteers.

Organizational Partnerships

This category emphasized community relationships and how they might need to change and expand through strategies, partnerships and new relationships in order to attract new volunteers. Small groups suggested new ways to work with businesses including corporate-sponsored volunteer vacations, release time for current employees, employee volunteer sabbaticals, and fee for service benefits using volunteer program services as an expanded benefit for employees.

New partners included collaborations for life long learning which would benefit agencies, corporations, volunteers and educational entities, online career and volunteer training partnerships in order to create new opportunities for boomers to

prepare for the future while employed, and service club partnerships. Neighborhood and grassroots organizations were discussed as an underutilized means of meeting community need and accessing volunteers where they live.

Organizational Culture and Values

The final category which the small groups considered was that of how an organizations' culture and values might be affected in light of what we know about the next generation of volunteers. Respondents saw a number of ways in which they thought organizations might change. One area was in the way volunteer opportunities were structured, offering more flexible and customized volunteer opportunities. This would mean organizations might need to think about evening and weekend opportunities as well as virtual volunteering. It would also mean that opportunities might be structured to create a seamless format for moving between volunteer and paid workforce opportunities. Volunteers might be recruited while working, volunteer, take advantage of life long learning options and retrain while volunteering, and return to the workforce before volunteering again. Organizations would need to structure opportunities responsive to the diversity of the baby boomer population, recognizing that one size does not fit all and that a wide range of opportunities with adequate access would be important. Finally, and viewed as very important, was the need to adequately train volunteer agencies regarding all seven of these target areas and about how best to be a service centered organization in the future.

Discussion/Conclusion

In all five of the conferences, there was opportunity for the participants to evaluate the Marketing to Baby Boomers session and give feedback. From this feedback, several critical issues about organizational readiness for the next generation of volunteers emerged which need to be addressed while simultaneously setting in motion organizational strategic planning which takes into consideration the ideas addressed in these sessions. Agency

personnel raised concerns regarding the difficulties in making the organizational changes necessary even though the changes are desired. Many believed that boards and councils would need to be retrained or reconfigured in order to assist with the necessary shifts. Others indicated that while the volunteer programs themselves might support the changes necessary, the agencies where volunteers are placed might not be ready to work with the new volunteers and would not be able to effectively utilize them without more training and technical assistance.

It was considered a given by the programs represented that if changes were to be made, the first level of that change would need to be from the federal government regarding new guidelines for the volunteer programs. Participants were asked during the sessions if they thought it was possible to do innovative recruitment and retention within the structure of their current programs and the response was generally that they thought this was not possible. However, at the end of each session, participants were presented with several innovative recruitment ideas which had been tested and were presented as possible means of recruiting boomers. Many program personnel showed a strong interest in the concepts and some indicated their intention to consider implementation of one or more of the ideas in the near future.

Program personnel indicated that the greatest barrier they believed kept them from implementing some of the strategic organizational changes was their current workload. Many of the ideas presented during the sessions were seen as strategies which would have to be undertaken in addition to their current responsibilities. Even if these changes might eventually be instituted in place of current policy or practice, the planning and structuring of such changes would be a significant additional burden. Most indicated that they were in relatively small programs with little staff, making added responsibilities or long range planning more difficult.

Participants in all five sessions were creative and comprehensive in their input into a blue print for marketing to baby boomers. They knew what needed to be done but were less sure how to effect federal or institutional shifts which would facilitate

the change process. Training and technical assistance as well as a plan which allows for phasing in changes over a specified period of time would help to ameliorate concerns. The intent of using a blue print concept in designing the workshops was to get broad range input and consensus about what needed to get done. That information provides a general guide, a blue print, which can then be adjusted to adapt to local needs and capacities. The participants had one demographic imperative clearly in mind--the boomers are coming, in fact, they are on the doorstep. If agencies hope to tap the expansive volunteer resource which the boomers represent, the time has come to adapt aspects of this blue print and plan for recruitment of the next generation of volunteers in every volunteer and community-based organization.

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