The Boomers Are Here!

A Station Training Toolkit

Ten learning activities with self-assessments and worksheets Senior Corps programs can use to help their community partners more effectively engage boomer volunteers.

Center for Intergenerational Learning
Training Division
TEMPLE UNIVERSITY

Corporation for NATIONAL & COMMUNITY SERVICE

The Boomers are Here!
A Station Training Toolkit

May, 2009

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Contents

Introduction

The boomers are no longer just coming, they are here! The oldest of the generation became eligible for Social Security in 2008 and they now can be found in all three Senior Corps programs. Boomers will come in even greater numbers in the years ahead but they are already beginning to transform Senior Corps programs.

Project directors are learning very quickly that the way of doing things that worked well enough for the traditionalists - the volunteers the Senior Corps was designed to serve and have made the programs what they are today – simply will not work for the boomers. Their skills, pattern of involvement and expectations are just too different. Boomers want to be defined by their skills, not their age. They want work that is meaningful. They expect choice and time flexibility. And they want to be treated as equals with paid staff. The old ways of working with volunteers won't work for this generation nor will it work for generations to come. The accommodations we make today to engage the boomers will also help us to engage future generations of 50+ volunteers.

FGP, RSVP and SCP are intermediaries. They get things done by placing volunteers with stations. This poses a challenge. A Senior Corps program can do everything right but if their community partners don't also "get it" they will fail to retain the boomers they have or to attract new ones in significant numbers. A Senior Corps program is only as boomer-friendly as its community partners. But there is also an opportunity in being an intermediary. Since Senior Corps programs work through a network of stations they can become agents of change in their local communities. They can educate their partners and encourage them to retool for the boomers.

Finding time to lead a process of community change isn't easy. You can't do it on your own. You will need the support of your sponsor and the involvement of your advisory council. Most of all you will need the help of boomer volunteers. Specially-skilled volunteers can help to set up and present workshops for community nonprofits. They also can provide ongoing help to station volunteer managers.

What busy Senior Corps directors need is a toolkit that you can use to create workshops or provide technical assistance. That is why "The Boomers Are Here: A Station Training Toolkit" was developed. It consists of 10, ready-to-present learning activities that can be used to customize trainings for FGP, RSVP and SCP community partners. It also includes self-assessment tools that your staff or volunteers can use to provide one-on-one technical assistance to stations. While the toolkit is primarily designed for the education of community partners its learning activities can also be used to raise the awareness of Senior Corps program staff, sponsor management and advisory councils.

This toolkit was designed to help Senior Corps program staff to become the boomer engagement experts in their communities and effective agents of change.

Scott Martin
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How to Use the Toolkit

At the core of this toolkit are learning activities. Interactive exercises rather than lectures were chosen so that the information would be easy to present and fun to learn. Also this format allows participants to make use of their own knowledge, learn from each other and come to their own conclusions.

You are not expected to make use of all 10 learning activities or to include any more than 5 or 6 in a single training. A variety of options are provided so that you can pick and choose the most appropriate activities for the audiences you want to reach and the length of time you have to do so.

Step 1- Choose an Icebreaker

If you are training people who do not know each other you might want to start off with an icebreaker. Two boomer-specific icebreakers are included in the toolkit:

Icebreaker	When to Use	Recommended Time	Recommended Audiences
1. The Lineup	Use this icebreaker when you want participants to get up and move. Recommended for small groups.	15-20 mins.	All audiences
2. Boomer True or False	Us this icebreaker when you have a large group seated at tables or rounds.	15-20 mins.	All audiences

Step 2- Choose Appropriate Learning Activities

Before choosing the learning activities that you will present to your community partners think about the following questions:

1. What is it that you need your community partners to understand about the boomers' very different approach to volunteering?
2. What do you need your community partners to do differently so that it will be easier for you to place and retain your boomer volunteers?

For example, an RSVP might want its community partners to understand that boomers want higher-skilled work (see learning activities #1 and #2). What it might want its partners to do is to identify short-term, specially-skilled projects that boomers could do (see learning activity #5). A FGP or SCP program, on the other hand, might want community partners to understand that boomers are looking for a greater personal benefit from volunteering (see learning activities #1 and #2). They might want their partners to

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identify low-cost incentives or enrichment activities that could be offered to volunteers (see learning activity #8).

Once you know what you want your community partners to understand and to do use the following chart to pick out the learning activities that would be most appropriate.

Learning Activity	When to Use	Time	Audience
1. The Traditionalists are from Mars, the Boomers are from Venus!	Use these activities when you want participants to understand **why** changes have to be made to engage and retain boomers. These exercises provide the theoretical foundation for everything to follow. It is recommended that all trainings begin with these activities if possible.	45 mins.	All audiences
2. Is the Paradigm of 50+ Civic Engagement Changing?		45 mins.	All audiences
3. Is Your Organization Ready for the Boomers?	Use this activity to help participants assess their organizational readiness for boomers. A great exercise to follow activities #1 and #2 above.	45 mins.	RSVP, FGP and SCP partners
4. What Could Specially-Skilled Boomers Do for You?	Use this activity to assist participants in identifying higher-skilled, capacity building tasks boomers might undertake in their organizations.	45 mins.	RSVP partners
5. The Forgotten Boomers	Use this activity to help participants think about the assets low-income boomers can bring to their organizations and to remind them that these forgotten boomers share many of the same volunteering preferences as more affluent members of the generation.	30 mins.	All audiences
6. Let's Get Flexible!	Use this activity to help participants brainstorm ways to make their regular, ongoing opportunities more flexible.	30 mins.	RSVP partners
7. Out-of-the-Box Structures for Volunteer Opportunities	Use this activity to introduce participants to new, innovative ways of structuring volunteer work that will make it more attractive to boomers.	30 mins.	RSVP partners
8. Sweetening the Deal	Use this activity to help participants brainstorm in-kind or low-cost incentives and enrichment activities that will attract and retain boomers.	45 mins.	All audiences
9. Managing Boomers	Use this activity to help participants move to a more facilitative, rather than directive, management style.	45 mins.	RSVP, FGP and SCP partners
10. Creating Change in Your Organization	Use this activity to help participants develop and commit to a plan of action for their organizations.	30 mins.	RSVP, FGP and SCP partners

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Step 3: Create a Training Agenda

Once you have chosen the learning activities you would like to present you need to put them into the form of a training agenda. Consider the following questions:

1. Just how much time do you think your community partners will be willing to commit to training?
2. Do you want to do the training all at once or in pieces over time?
3. Given the time constraints facing you what are the most important learning activities you want to present and in what order?

Here are examples of what an agenda might look like for a one, full-day training of partners:

RSVP Community Partner Training

9:00 a.m.	Welcome by the RSVP Program Director
9:10 a.m.	Icebreaker
9:30 a.m.	Activity 1: The Silent Generation Is From Mars, the Boomer Generation is from Venus
10:15 a.m.	Activity 2: Is the Paradigm of 50+ Civic Engagement Changing?
11:00 a.m.	Break
11:15 a.m.	Activity 3: Is Your Organization Ready for the Boomers?
12:00 p.m.	Lunch
12:30 p.m.	Activity 5: What Could Specially-Skilled Boomers Do for You?
1:15 p.m.	Activity 9: Managing Boomers
2:00 p.m.	Break
2:15 p.m.	Activity 7: Out of the Box Structures for Volunteer Opportunities
2:45 p.m.	Activity 10: Creating Change in Your Organization
3:15 p.m.	Wrap-up and Adjournment

FGP or SCP Community Partner Training

9:00 a.m.	Welcome by FGP or SCP Program Director
9:10 a.m.	Icebreaker
9:30 a.m.	Activity 1: The Silent Generation Is From Mars, the Boomer Generation Is From Venus
10:15 a.m.	Activity 2: Is the Paradigm of 50+ Civic Engagement Changing?
11:00 a.m.	Break
11:15 a.m.	Activity 3: Is Your Organization Ready for the Boomers?
12:00 p.m.	Lunch
12:30 p.m.	Activity 4: The Forgotten Boomers
I:00 p.m.	Activity 8: Sweetening the Deal
1:30 p.m.	Break
1:45 p.m.	Activity 9: Managing Boomers
2:30 p.m.	Activity 10: Creating Change in Your Organization
3:00 p.m.	Wrap-up and Adjournment

Additional Considerations

Encourage the volunteer managers from your partner organizations to come to the training with their executive directors or someone else in a management position. You will find that your partners will be more likely to make changes if there is a champion in management.

While some of the learning activities of "The Boomers Are Here" begin with individual exercises they all involve some degree of small group interaction. For this reason it is important to have a training room set-up that can accommodate small group formation. A room with round or rectangular tables would be ideal. Other arrangements can also work if the chairs can be easily moved. Be sure to choose a facility that will be accessible to people with disabilities.

Choosing an appropriate facilitator to conduct your training is very important. If you have good, basic training skills then with the help of this toolkit you should be able to provide a very effective training. If you are not confident of your training skills then choose someone else within the organization or a volunteer with a training background.

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Icebreaker 1: The Lineup

Audience: All audiences less than 20 people.

Instructions:
1. Ask participants, <u>without talking</u>, to form an "age line" starting with the youngest person in the room at the far left to the oldest at the far right.
2. Once the line is formed ask the participants to rearrange themselves in response to the following questions about work. Ask those who agree with the statement to move to the right of the line, those who disagree to move to the left and those who aren't sure to stand in the middle.
   o I think people at work should do more talking face-to-face and less exchanging of emails.
   o I seldom if ever leave work on time.
   o Just tell me what you want me to do and then let me go do it. We don't have to talk it to death!
   o People should pay their dues before getting promoted. I don't care how talented you are.
   o I expect my boss to be a coach and to provide me with feedback.

Introduction:
In today's training we are going to explore the differences between the boomer's and the traditionalist's approach to civic engagement. But let's begin our discussion of generational differences by looking at how people of different ages sometimes disagree on how best to communicate or get things done in the workplace.

Wrap-up:
As everyone remains standing ask the following questions:
1. To what extent are different attitudes about work related to age?
2. What are some attitudes towards work we associate with older people and what are some attitudes we associate with younger people?
3. Where in this exercise did you see age possibly playing a factor? Where didn't it seem to be a factor?

Conclude the icebreaker by pointing out that you and they will be making some generalizations about boomers as a group today. It is important to remember that generalizations about a group as a whole don't always apply to every individual who makes up that group. Ask participants to use the information today as a tool to help them better understand what boomers might be thinking and wanting, but not to stereotype.

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Icebreaker 2: Just How Much Do You Know About the Boomers?

Audience: All Audiences

Instructions:
1. Pass out Icebreaker Handout 2.1; tell participants that they have 10 minutes to complete the true or false quiz.
2. Pass out Icebreaker Handout 2.2; ask everyone to score their quiz
3. Ask participants to each introduce themselves and to share one thing they learned about boomers from taking the quiz with those seated at their table or in their small group.

Introduction:

Today we are going to be talking about the boomers, people born between 1946 and 1964. Just how much do know about this generation? We are going to start off with a quiz. Don't worry you won't be turning it in and you don't have to share your score with anyone. You just might be surprised by the answers.

Wrap-up

Ask if someone would like to share a new learning with the entire group. Close the icebreaker by pointing out that while we will be making some generalizations about the boomers today we must never forget that they are actually a very diverse group of people. Boomers differ from one another in fundamental ways such as age, income, education and ethnicity.

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Icebreaker 2:   Just How Much Do You Know About the Boomers?
Icebreaker Handout 2.1

T or F   1. The boomers represent 26% of the American population.

T or F   2. The first wave of boomers turned 62 in 2008.

T or F   3. Nearly 1 in 5 boomers are minorities.

T or F   4. Approximately 50% of boomers plan to stop working entirely when they reach age 65.

T or F   5. Approximately 70% of boomers do not have a college degree

T or F   6. Most all boomers are married empty nesters.

T or F   7. Approximately 50% of Americans ages 50 to 64 use the Internet.

T or F   8. Over a third of boomers have children living in the home.

T or F   9. Twenty-five percent of boomers have no savings or investments at all.

T or F   10. The retention rate for boomer volunteers is about the same whether they are providing professional/managerial services or general labor.

T or F   11. Boomers volunteer at higher rates today than previous cohorts did at roughly the same age.

T or F   12. Mentoring is the most popular volunteer activity among boomers.

1. True. In 2006 the Census Bureau estimated the number of American boomers at 78.2 million.
(Source: Facts for Features: Oldest Baby Boomers Turn 60! U.S. Census Bureau, January, 2006.)

2. True. Boomers are defined as adults born between 1946 and 1964.
(Source: Facts for Features: Oldest Baby Boomers Turn 60! U.S. Census Bureau, January, 2006.)

3. True. Approximately 17% of boomers are minorities. Twelve percent are African American, 9.8% are people of Hispanic origin and 4% are Asian or Pacific Islanders. Less than 1% are American Indians or Alaska Natives.
(Source: Demographic Profile: American Baby Boomers, MetLife Mature Market Institute, May, 2005.)

4. Flase. The number of boomers who plan to stop working entirely at age 65 is only 11%.
(Source: How Well Do You Know Boomers? Counting down the top 10 Boomer Myths. Focalyst Insight Report, April, 2008.)

5. True. Boomers are the most highly educated generation but still only 28.5% hold a bachelors or higher. Eighty-nine percent of boomers have finished high school.
(Demographic Profile, Mature Market Institute, Metlife, 2003)

6. False. A third of boomers (23 million) are single.
(Source: How Well Do You Know Boomers? Counting down the top 10 Boomer Myths. Focalyst Insight Report, April, 2008.)

7. False. In May, 2008 70% of Americans ages 50 to 64 made use of the Internet. Thirty-five percent of Americans 65+ were Internet users.
(Source: Pew Internet and American Life Project, April 18 to May 11, 2008 Tracking Project.)

8. True. Thirty-seven percent of boomers have children living in the home. Over 5 million boomers have had an adult child move back into the home.
(Source: How Well Do You Know Boomers? Counting down the top 10 Boomer Myths. Focalyst Insight Report, April, 2008.)

9. True. The boomers are the wealthiest generation but there is a growing divide between the "haves" and "have nots".
(Source: How Well Do You Know Boomers? Counting down the top 10 Boomer Myths. Focalyst Insight Report, April, 2008.)

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10. False. The retention rate for boomers who volunteer in professional or management capacities is 74.8% and 56% for those providing general labor or transportation.
(Source: Research Brief: Volunteering in America Highlights, Corporation for National and Community Service, July, 2008)

11. True. The volunteer rate for boomers ages 46 to 57 in 2007 was 30.9% compared to 25.3% for the G.I. Generation (born 1910 to 1930) and 23.2% for the Silent Generation (born 1931 to 1945) at the same ages.
(Source: Keeping Baby Boomers Volunteering: A Research Brief on Volunteer Retention and Turnover. Corporation for National and Community Service, March, 2007)

12. False. In 2007 the most popular volunteer activities for boomers aged 45 to 55 were 1. fund raising or selling items to raise money, 2. tutoring or teaching and 3. providing professional or management assistance including serving on a board or committee.
(Source: Volunteering in the United States, 2007. Bureau of Labor Statistics, January, 2008.)

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Learning Activity 1: The Silent Generation is from Mars, the Boomer Generation is from Venus

Audience: All Audiences

Goal:

According to generational theory people who grow up during the same time period and experience the same defining events tend to hold similar attitudes and preferences throughout their lives. The generational characteristics of the traditionalists, our volunteers of the past, and the boomers couldn't be more different. The goal of this activity is help participants see just how different these two generations are.

Objectives:

After this learning activity participants will be able to:
- Identify the birth dates of the traditionalists and boomers.
- Differentiate the generational characteristics of the traditionalists from those of the boomers.
- List at least one implication for civic engagement posed by the transition from the traditionalists to the boomers.

Time: 45 minutes

Handouts:

- Activity Handout 1.1
- Activity Handout 1.2

Instructions:

1. Present the introduction.
2. Pass out Activity Handout 1.1; ask participants as a table or small group to identify which traits are most characteristic of the traditionalists and which are most characteristic of the boomers by placing a "T" or "B" in the spaces provided.
3. Pass out Activity Handout 2.2; ask participants to compare their answers with the suggested answers provided.
4. Ask participants as a small group to discuss how 50+ civic engagement might have to change in order to attract and retain boomers.
5. Wrap-up the activity (see below).

Introduction:

Many of our ideas about the "older volunteer" were shaped by our experiences with the traditionalists. These were the "super volunteers" born between 1914 and 1945 that our organizations have depended upon for the last several decades. The traditionalists, unfortunately, are aging out of our programs but there is a new generation to engage that doesn't fit the traditional mold. These are the boomers, people born between 1946 and 1964.

The attitudes and preferences of the traditionalists and boomers couldn't be more different. The traditionalists, for example, who lived through the Great Depression tend to put duty before pleasure while the boomers who lived during a time of affluence tend to value personal gratification. The traditionalists who largely worked in manufacturing were content with set jobs, strict rules and close supervision while the boomers who are more likely to be knowledge workers expect more freedom in how they get the job done and to be included in decision-making.

In this learning activity we are going to look at the characteristics of traditionalists and boomers and see just how different the two generations are.

Wrap-up:

Ask if anyone has an insight or comment they would like to share with the large group. Conclude by stating again that the characteristics of the traditionalists and boomers are very different and as a consequence the ways we go about engaging them in volunteering will also have to be different. If time permits, conduct a large group discussion using the following questions:

- Do you see these generational differences among your current volunteers? Give an example.

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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Learning Activity 1:
The Silent Generation is from Mars, the Boomer Generation is from Venus
Activity Handout 1.1

For each item below place a "T" in the space provided if it is most characteristic of the traditionalists or a "B" if it is most characteristic of the boomers.

_____   Believe you can change the world

_____   Formal dress code

_____   Respect authority

_____   Nonconformists, rebels

_____   Traditional values

_____   Personal fulfillment

_____   Management by consensus

_____   Cordless phone, TV, cassettes

_____   Proud to be a "senior"

_____   Causal attire

_____   Question authority

_____   Loyal to organizations

_____   Conform, blend in

_____   Cautious spenders

_____   Follow the rules

_____   Duty before pleasure

_____   Civic duty

_____   Break rules when necessary

_____   Team-oriented

_____   Dedication and sacrifice

_____   Maintain the status quo

_____   Top-down, hierarchical management

_____   Buy now, pay later

_____   Workaholics

_____   Civil rights movement, affirmative action

_____   Rotary phone, radio

_____   Believe you don't have to grow old

_____   Suspicious of organization

Learning Activity 1:
The Silent Generation is from Mars, the Boomer Generation is from Venus
Activity Handout 1.2

B   Believe you can change the world

T   Formal dress code

T   Respect authority

B   Nonconformists, rebels

T   Traditional values

B   Personal fulfillment

B   Management by consensus

B   Cordless phone, TV, cassettes

T   Proud to be a "senior"

B   Causal attire

B   Question authority

T   Loyal to organizations

T   Conform, blend in

T   Cautious spenders

T   Follow the rules

T   Duty before pleasure

T   Civic duty

B   Break rules when necessary

B   Team-oriented

T   Dedication and sacrifice

T   Maintain status quo

T   Top-down, hierarchical management

B   Buy now, pay later

B   Workaholics

B   Civil rights movement, affirmative action

T   Rotary phone, radio

B   Believe you don't have to grow old

B   Suspicious of organizations

Learning Activity 2: Is The Paradigm of 50+ Civic Engagement Changing?

Audience: All Audiences

Goal:
Given the very different generational characteristics of the traditionalists and boomers it makes sense that their approaches to volunteering would also be different. As boomers make up more and more of volunteers 50+ the pattern of older adult volunteering is changing. In this activity participants will explore just where the changing paradigm of civic engagement might be headed.

Objectives:
After this learning activity participants will be able to:
- Identify key dimensions of the paradigm of civic engagement.
- Describe what these dimensions looked like under the old paradigm.
- Envision what they might look like under the paradigm of the future.

Time: 45 minutes

Handouts:
- Handout 2.1

Instructions:
1. Present the introduction.
2. Pass out Activity Handout 2.1; instruct participants as individuals to complete column 3 of the worksheet indicating how they think each dimension of civic engagement will look in the future.
3. When everyone is done writing, ask participants to share their responses with their small group.
4. Wrap-up the activity (see below).

Introduction:
The generational characteristics of the traditionalists and boomers couldn't be more different. It shouldn't come as a surprise then that their approaches to volunteering are different, too. For example, the traditionalists who were very loyal to the established institutions of their day tend to be very loyal to the organization for which they volunteer and often stay for many years. Boomers, on the other hand, who became disillusioned with the institutions of their formative years tend to be loyal to causes, not organizations, and will quickly move on if they feel frustrated or dissatisfied.

A paradigm is a pattern. We have a pretty good idea of what the pattern of 50+ civic engagement was for the traditionalists. In this activity we are going to think about how that paradigm is now changing as more and more boomers volunteer with our organizations.

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Wrap-up:

Ask if anyone would like to share an insight or comment with the large group. Underscore that there are no right or wrong answers here. We can not know for sure what the new paradigm will look like but generational characteristics do give us some clues. If time permits, conduct a large group discussion using the following questions:

- How do you see the paradigm change playing out in your organization? Give an example.

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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Learning Activity 2:
Is the Paradigm of 50+ Civic Engagement Changing?
Activity Handout 2.1

Directions: As an individual, complete the following worksheet by writing in column 3 what you think each dimension will look like under the new, emerging paradigm.

Dimension	What it looked like under the old paradigm	What it looks like under the new paradigm
Motivation for Volunteering	Civic Duty	
Relationship with the Organization	Loyal and Conforming	
Pattern of Volunteering	Long-term and Regular	
Management Style of Volunteer Manager	Top/Down, Directive	
Volunteer Empowerment	Minimal; independent action or thinking discouraged	

Volunteer Opportunities	Defined positions with set procedures and rules	
How Volunteer Work is Done	Mostly working alone focused on a discrete task	
Volunteer's Expectation of Reward	Low; seeking mostly recognition and some expense reimbursement	
Volunteer Personal Development	Minimal; volunteers receive training only to do a specific job	

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Learning Activity 3: Is Your Organization Ready for the Boomers?

Audience: RSVP, FGP and SCP Community Partners

Goal:
If the generational shift is changing the paradigm of civic engagement then our organizations and volunteer programs must also change. Some organizations are making impressive progress, while others are just beginning. The goal of this learning activity is to help participants identify just what changes need to be made and how far along their organizations are in the process.

Objectives:
After this learning activity participants will be able to:
- List characteristics of a boomer-friendly organization.
- Evaluate their organization's progress against these characteristics.
- Target one or two areas to improve over the coming year.

Time: 45 minutes

Handouts:
- Activity Handout 3.1
- Activity Handout 3.2

Instructions:
1. Present introduction.
2. Pass out Activity Handout 3.1; ask participants to rate how true each statement is for their organization by circling the appropriate number to the left. Ask that they add up their score for each category as they proceed through the assessment.
3. Pass out Handout 3.2; ask participants to transfer their scores from the assessment to the scoring grid by placing a checkmark in the appropriate column to the right of each category.
4. Ask each participant to share one or two areas they would like to target for improvement with their small groups.
5. Wrap-up the activity (see below).

Introduction:
It should be clear by now our organizations will have to make some changes in order to engage boomers. But what does a boomer-ready organization look like? Is there a certain kind of organizational culture, volunteer opportunities and management style that is most likely to attract and retain boomers?

Research on boomers, generational characteristics and the changing paradigm of 50+ civic engagement all give us clues as to what an ideal organization might look like. In this activity we are going to complete an organizational self-assessment. This tool presents one point of view of what it might mean to be ready for boomers. The purpose of this

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exercise is not so much to provide universal standards but to spark your thinking about what being ready for boomers may mean for your particular organization.

Let's get started.

Wrap-up:

Ask if anyone would like to share an insight or comment with the large group. Conclude by stating that this exercise presents one point of view but what is most important is their own assessment of their organization's unique situation. Remind participants that their organizations don't have to be perfect to engage boomers. The ideal is something to shoot for. Urge those with a lot of work to do to be patient. Change doesn't happen overnight. If time permits, conduct a large group discussion using the following questions:

- What actions have you already taken to increase the readiness of your organization to engage boomers?

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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Learning Activity 3:
Is Your Organization Ready for the Boomers?
Activity Handout 3.1

1. Awareness Building & Planning

Not At All	Some	A Great Deal	
1	2	3	We have educated our staff about the boomers through discussion at staff meetings or formal workshops
1	2	3	There is a sense of urgency here about doing business differently to engage boomers that goes beyond just the volunteer manager
1	2	3	We solicit input from current boomer volunteers through focus groups, surveys or by creating an advisory group
1	2	3	We have developed a strategy for attracting boomers to our organization
1	2	3	Our strategy is being implemented. Responsibilities have been assigned and progress is being monitored.

_____ Total Score for Awareness Building & Planning

2. Organizational Culture

Not At All	Some	A Great Deal	
1	2	3	We value high performance; e.g. we set high standards for staff and volunteers, hold them accountable and reward high performers
1	2	3	We are known for being a well-organized and managed organization
1	2	3	There is a minimum of office politics and infighting in our organization
1	2	3	We feel comfortable here expressing different points of view
1	2	3	We are open to change; we are always looking for better ways of doing things

_____ Total Score for Organizational Culture

3. Physical Infrastructure

Not At All	Some	A Great Deal	
1	2	3	There is work space here to support higher level volunteering: e.g. private office or cubicle space with telephone and computer
1	2	3	We have enough conference room space to accommodate volunteer team or committee meetings
1	2	3	Our computers dedicated to the use of volunteers are up-to-date and loaded with appropriate software
1	2	3	Our work environment is attractive, clean, uncluttered and comparable to that in the corporate sector
1	2	3	We provide for volunteer comfort: e.g. we offer lockers, free parking or dedicated break area

_____ Total Score for Physical Infrastructure

4. Varied Commitment Levels and Time Flexibility

Not At All	Some	A Great Deal	
1	2	3	We offer the option of one-time volunteering, e.g. for special events or fund raisers
1	2	3	We offer the option of short-term (1-6 month), project-based volunteering
1	2	3	We offer the option of volunteering on an occasional or on-call basis
1	2	3	We offer the option of volunteering on weekday evenings
1	2	3	We offer the option of volunteering on the weekends

_____ Total Score for Varied Commitment Levels and Time Flexibility

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5. Innovative Structures

Not At All	Some	A Great Deal	
1	2	3	We offer opportunities where a volunteer can work as member of a team
1	2	3	We offer opportunities for volunteers to work from home via the Internet, email, fax or phone
1	2	3	We will create a new opportunity to take advantage of the unique skills and interests of a specific volunteer
1	2	3	We offer opportunities to volunteer as a family or with grandchildren
1	2	3	We offer opportunities for workplace groups to volunteer

_____ Total Score for Innovative Structures

6. Continuum of Roles

Not At All	Some	A Great Deal	
1	2	3	Relatively few of our volunteers are doing clerical work or general labor
1	2	3	Most of our volunteers do work that requires some level of pre-service training
1	2	3	We utilize volunteers to supervise other volunteers
1	2	3	We utilize volunteers to manage programs or projects
1	2	3	We utilize volunteers to provide technical or professional services

_____ Total Score for Higher-skilled Roles

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7. Management Style

Not At All	Some	A Great Deal	
1	2	3	Anyone can exercise leadership in our organization; it is more about who has the best idea than what position or title you hold
1	2	3	Our approach to management is more facilitative and empowering than authoritarian and controlling
1	2	3	We encourage volunteers to make on-the-job decisions without always having to get prior approval from staff
1	2	3	We involve volunteers in organizational decision-making; e.g. we actively solicit their input through a suggestion box, group meetings or the formation of staff/volunteer task forces
1	2	3	We treat volunteers more like equal partners than subordinates

_____ Total Score for Management Style

8. Recognition and Incentives

Not At All	Some	A Great Deal	
1	2	3	We give volunteers some choice in how they are recognized
1	2	3	We recognize volunteers not just based on hours of service but also for individual achievements or accomplishments
1	2	3	We provide personal development opportunities to volunteers such as a career ladder, leadership development or enrichment training
1	2	3	We provide volunteers with cash-equivalent incentives such as gift certificates, free tickets or discount card
1	2	3	We provide stipends or part-time pay to support those willing to do intensive, high-skilled service with our organization

_____ Total Score for Recognition and Incentives

9. Marketing & Recruitment

Not At All	Some	A Great Deal	
1	2	3	Our marketing materials have the polished, professional look boomers have come to expect
1	2	3	We are confident that the key messages and pictures in our promotional pieces are successfully speaking to boomers
1	2	3	We have an overall boomer recruitment plan that includes strategies for reaching specific boomer populations
1	2	3	We have had boomers critique our marketing pieces and/or serve as pro-bono marketing consultants
1	2	3	We have adequate funding to support the level of boomer marketing and recruitment we need to do

_____ Total Score Marketing & Recruitment

10. Volunteer Management Capacity

Not At All	Some	A Great Deal	
1	2	3	We have someone responsible for managing volunteers who can devote sufficient time to the task
1	2	3	There is adequate funding for anticipated volunteer training and recognition costs
1	2	3	We have an adequate screening protocol that involves calling references, personal interviews and/or background checks
1	2	3	We have a personnel file for each volunteer that contains items such as their application, reference checks and a written job description
1	2	3	We have volunteers assisting with and/or managing aspects of the administration of the volunteer program

_____ Total Score Volunteer Management Capacity

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Learning Activity 3:
Is Your Organization Ready for the Boomers?
Handout 3.2

Directions: Transfer your scores from the self-assessment form to the grid below by placing an "X" in the appropriate column next to each category.

Dimension	0 – 7 Low	8 – 12 Moderate	13 – 15 High
1. Awareness Building & Planning			
2. Organizational Culture			
3. Physical Infrastructure			
4. Commitments & Time Flexibility			
5. Innovative Structures			
6. Continuum of Roles			
7. Management Style			
8. Recognition & Incentives			
9. Marketing & Recruitment			
10. Volunteer Management Capacity			

Learning Activity 4: What Could Specially-Skilled Boomers Do For You?

Audience: RSVP Community Partners

Goal:

Volunteers are often used to provide direct or indirect client services and low-level administrative support. They are less frequently utilized to build the capacity of the organization through providing professional or technical services. This can be a problem since boomers have expressed an interest in providing these kinds of services. The goal of this learning activity is to help participants identify capacity building roles boomers might play in their organizations.

Objectives:

After this learning activity participants will be able to:
- Identify at least 1 to 3 organizational needs that might be addressed by a boomer.
- Write a job title for each new opportunity.
- Discuss challenges that might arise in engaging volunteers in organizational capacity building roles.

Time: 45 minutes

Handouts:
- Handout 4.1

Instructions:
1. Present the introduction.
2. Distribute Handout 4.1; ask participants as individuals to complete the worksheet.
3. Once everyone is finished doing the individual work, ask participants to 1. share with their small group one, new opportunity they might offer to boomers and 2. brainstorm with the group where boomers with the required skills might be found.
4. Wrap-up the activity (see below).

Introduction:

In many organizations volunteers are used to provide direct client services such as mentoring, indirect client services like packing food or low-level administrative work such as answering the telephone. We know from research that boomers also have an interest in doing professional or managerial work but not many organizations are using them in these capacities.

There are, of course, some barriers organizations may face in using boomers in new ways. Some paid staff may think that only they are qualified to do this kind of work. Others may be reluctant to give up control, fear losing their jobs or worry about liability. These challenges can be overcome. When a staff member sees the credentials of a potential volunteer or hears of what a boomer has done for someone else on staff they may change their point of view.

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In this learning activity we want to challenge you to think in new ways about what a boomer could do for you.

Wrap-up:

Ask if anyone would like to share an insight or comment with the large group. Suggest that participants might want to have their executive director or other key staff complete this assessment. If time permits, conduct a large group discussion using the following questions:

- What successes have you had in using volunteers in these types of roles?

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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Learning Activity 4: What Could Specially-Skilled Boomers Do For You?
Activity Handout 4.1

1. Answer the question: "If we had more time, people or expertise we would

_____

_____

_____

_____

_____

_____

2. Review the tasks below. Rate how urgent a need each is for your organization by placing a check in the appropriate column to the right.

Potential Need	Not a Need	Somewhat of a Need	A Critical Need
create or review the mission			
develop a strategic plan			
conduct an assessment of insurance coverage			
change the organization's culture			
assess the organization's efficiency			
conduct board development			
create a board manual			
facilitate a board or staff retreat			
obtain consultation from an attorney			
conduct management development training			
review the organization's financial reports and processes			
develop a succession plan for the executive director			

produce an annual report			
obtain executive coaching			
review HR policies, compensation plan or benefits			
create or update the employee personnel manual			
conduct a staff training needs assessment			
create and deliver staff trainings			
create or update the staff orientation manual			
find assistance with special event planning			
create a logo and branding			
design and layout printed materials			
write copy for printed materials			
create or improve a website			
obtain the assistance of a photographer or videographer			
promote the organization through public speaking			
obtain grant writing assistance			
evaluate the current fundraising program			
research funding opportunities			
research new program models			
consult a psychologist or psychiatrist			
assess client needs			
develop new programs or services			
implement new programs or services			
find managers for new programs or projects			
conduct program evaluations			
develop program evaluation instruments			

evaluate current computer hardware and databases			
create and deliver computer training to staff or clients			
find assistance with computer troubleshooting			
find assistance with recruiting volunteers			
find assistance with the interviewing of volunteers			
find assistance with the training of volunteers			
find an editor for the volunteer newsletter			
conduct a space utilization study			
create an organizational disaster plan			
conduct an energy audit			
find interior design assistance			
find landscape design assistance			
find assistance from a skilled trades person (e.g. carpenters)			
Other:			
Other:			
Other:			

3. Based on the analysis you have done above now write the titles of three new opportunities your organization might offer to specially-skilled boomers:

1. Title _____

2. Title _____

3. Title_____

Learning Activity 5: The Forgotten Boomers

Audience: RSVP, FGP and SCP Community Partners

Goal:
When people think of boomers they often have well-off, educated professionals in mind. Low-income boomers tend to be overlooked. The goals of this activity are to help participants think about the assets these other boomers can bring to their organizations and to remind them that low-income boomers share many of the same volunteering preferences as more affluent members of the generation.

Objectives:
After this learning activity participants will be able to:
- List assets low-income boomers can bring to an organization.
- List volunteer preferences that apply equally to high and low-income boomers.

Time: 30 minutes

Handouts:
- Handout 5.1

Instructions:
- Present the introduction.
- Distribute Activity Handout 4.1; ask participants to read the case study and then to discuss the questions as a small group.

Introduction:
When people think of boomers they often have the image of well-off, highly educated professionals in mind. While it is true that the boomers are the wealthiest and most educated generation to reach retirement years, over 7% of boomers live in poverty and the gap between the "haves" and "have-nots" appears to be increasing. We tend to forget low-income and less educated boomers in our thinking about 50+ civic engagement.

Low-income boomers often have completed more schooling than their parents. Many have been active in their communities and assumed leadership positions. What they lack in formal education they often make up with practical know-how gained through many years of having to survive on a minimal income.

Forgotten boomers have been impacted by many of the same defining experiences that have shaped more affluent members of the cohort. They, too, have volunteering preferences very different from their traditionalist parents.

In our next activity we are going to focus on these forgotten boomers.

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Wrap-up

Ask if anyone would like to share an insight or comment with the large group. Point out that low-income boomers who grew up in America are likely to share many of the same generational characteristics, and therefore, volunteering preferences as more affluent members of the generation. If time permits, conduct a large group discussion using the following questions:

- What is an example of a unique skill or understanding that a low-income volunteer has brought to your organization?

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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Learning Activity 5:
The Forgotten Boomers
Activity Handout 5.1

You are interviewing a potential volunteer. Her name is Viola Smith and she is a neatly dressed African American woman, sixty-two years of age. A bit worn out from her walk from the bus stop, Ms. Smith is sitting across from you, smiling and eager to get started. You begin by saying "tell me a little bit about yourself."

> *Well, I worked in the food service industry for about 15 years. I didn't make much money but I enjoyed the work. Then my husband died and two years ago I had to quit my job. It was my hip. I just couldn't stand all day anymore. I get a disability check and I manage to get by sharing my apartment with my daughter and her two children. It's hard though. There never seems to be enough money to go around.*

"Why are you interested in volunteering", you ask.

> *I want to get out of the house more and do something good for the community. In the afternoon I look after my grandkids but for most of the day I have nothing to do. That's not like me. When I was a teenager I went to the march on Washington with some young people from my church. It was so inspiring to hear Dr. King give his "I Have a Dream" speech. Every since then I have tried to do what I can in the community. I helped to start an after-school program at my church. I'm worried about our African American youth. There are so many dangers out there: drugs, crime and violence. And our youth don't seem to know all that much about their history. They have new heroes now, I guess.*

Your next question is, "what skills would you like to share with us?"

> *My mother never finished high school but I did. In fact, I have been taking some night classes in cosmetology at a community college. But what I think is more important is what I have learned in the school of life.You don't live the kind of life I have without learning a few things that might be helpful to others.*

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Small Group Discussion Questions:

1. What might be some of the unique assets – know-how, resiliencies, sensitivities, insights – that someone like Viola could bring to your particular organization and how would you make use of them?

2. Which of the following volunteering preferences attributed to boomers in general might also apply to Viola?

☐   Be given meaningful work
☐   Be presented with choices and options
☐   Be challenged but not overwhelmed
☐   Have intellectual stimulation
☐   Utilize or develop leadership skills
☐   Use higher-level skills
☐   See tangible results
☐   Enjoy some degree of time flexibility
☐   Make a time-limited commitment
☐   Connect with the community
☐   Enjoy collegial relationships
☐   Be part of decision-making
☐   Exercise some autonomy
☐   Experience personal growth
☐   Gain new skills
☐   Build a resume

Learning Activity 6: Creating Time Flexibility

Goal:
Boomers are busy people. Many will continue to work into the traditional retirement years. Some will be caring for children and older parents. Others will travel, go back to school or enjoy a host of leisure time activities. If we are to engage boomers we have to make it possible for them to fit civic engagement into their busy schedules. The goal of this activity is to help participants explore ways they can make their regular, ongoing opportunities more flexible.

Objectives:
After this learning activity participants will be able to:
- Discuss why boomers require time flexibility.
- List strategies for making regular, ongoing opportunities more flexible.

Time: 45 minutes

Handouts:
- Activity Handout 6.1
- Activity Handout 6.2

Instructions:
1. Present the introduction.
2. Distribute Activity Handout 6.1; ask participants to read through the case study as individuals and then as a group come up with as many strategies as they can think of for introducing time flexibility into the opportunity.
3. Wrap-up the activity (see below).

Introduction:
Many organizations want their volunteers to come in on a regular basis just like paid staff. The traditionalists were able to make that kind of commitment. Fewer boomers will be able to do so. Boomers expect to work well into the traditional retirement years. Some will be caring for children and aging parents. Enjoying as many as 20 to 30 years of good health following full-time work, many boomers will go back to school, travel and enjoy leisure activities ranging from white water rafting to yoga.

If we are going to engage significant numbers of boomers we need to make it easy for them to fit civic engagement into their busy schedules. But what do we do if we have tasks that simply have to be performed on a regular basis?

In this learning activity we are going to explore strategies that can be used to bring time flexibility to these regular, ongoing opportunities.

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Wrap-up:

Ask one or two small groups to share their strategies. Then invite the other groups to add strategies that have not been mentioned. Distribute Handout 6.2. Explain that these are strategies that can be used to make some regular, ongoing volunteer opportunities more flexible. If time permits, conduct a large group discussion using the following questions:

- Offering time flexibility can mean more work for the volunteer manager. What strategies have you developed to manage this?

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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Learning Activity 6:
Creating Time Flexibility
Activity Handout 6.1

Directions: Read through the case study below and then as a group brainstorm ways this volunteer manager could make her opportunity more flexible.

Case Study

Margaret Smith is the coordinator of an elementary school's mentoring program. Children enrolled in the program meet with their mentors once each week to eat lunch, play games on the computer or just talk. For many years Margaret has relied on a group of volunteers from several neighboring churches. They, however, have become quite elderly and one by one are dropping out of the program. Margaret is worried that she won't be able to find the volunteers needed to keep the program running. She gets calls from boomers but when she tells them that they need to make a regular, weekly commitment for at least one school year most loose interest. Margaret is coming to realize that she has no choice but to give volunteers more flexibility. She is concerned that the kids won't get the consistent attention that they need and that more flexible scheduling will mean an increased workload for her.

Discussion Question: How might Margaret give the volunteers more flexibility while at the same time meeting the needs of the children?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

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Strategies for Creating Time Flexibility

Substitution- If it just has to be done every day, week or month, try creating the position of "substitute." These are volunteers who are willing to fill-in occasionally as their schedules permit.

Scheduling Month-by-Month – Here volunteers are asked to join a pool of volunteers who will be called at the end of each month to fill slots for the following month as their schedules permit.

Job Sharing- This involves assigning two or more volunteers to the same task. The volunteers work out among themselves who will actually volunteer each week.

Rotation- Under this option four volunteers might take turns filling a volunteer assignment, each working for a period of just three months out of the year. Such an arrangement can work well for snowbirds or seasonal workers.

Segmentation- Can an existing, labor intensive position be broken down into more manageable short-term opportunities? For example, a special event coordinator might be replaced by several short-term volunteers each working on one piece of the overall work plan.

Telecommuting- Here the volunteer provides the service from home or some other off-site location using the Internet, phone or fax.

Learning Activity 7: Out-of-the-Box Structures for Opportunities

Audience: RSVP Community Partners

Goal:
To engage boomers we not only have to rethink "what" we ask volunteers to do but also "how" and "where" they do it. In the past volunteers have largely worked on-site, alone and under the direct supervision of a staff member. Boomers will want additional options. The goal of this activity is to introduce participants to innovative ways of structuring opportunities that provide more satisfaction, flexibility and fun.

Objectives:
After this learning activity participants will be able to:
- List 6 innovative ways of structuring work for boomers.
- Provide a definition for each.
- Know where they can go to find additional information about each approach.

Time: 30 minutes

Handouts:
- Activity Handout 7.1
- Activity Handout 7.2

Instructions:
1. Present the introduction.
2. Distribute Handout 7.1; inform participants that they have 10 minutes to complete the word puzzle as a small group. Explain that the puzzle depicts 6 innovative ways of structuring volunteer work for boomers.
3. At the end of 10 minutes (or when everyone is done) ask one small group to share their answers. If they are unable to provide all 6 correct answers ask another group to fill in.
4. Distribute Handout 7.2; ask participants to review the structures listed there. Then ask them to share with their small groups any experiences they have had in making use of these ways of structuring volunteer work.
5. Wrap-up the activity (see below).

Introduction:
We know we have to change the "what" of volunteer work. Low-priority, routine labor isn't going to appeal to the boomers. But we also have to rethink the "how" and "where" of work.

Historically most volunteers have worked onsite under the close supervision of a staff member. They typically have been asked to do one small task out of a much larger process and to follow closely the guidelines laid out by staff. Volunteers have tended to work alone without much dependence on other volunteers for getting the work done. This way of working suited many of the traditionalists who were more likely to have worked in

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manufacturing or under a traditional top-down, hierarchical management structure. Boomers, on the other hand, have worked in a knowledge-based economy. They are more likely to have worked in an office with cubicles, computers, teams, project-based work and greater self-direction.

In this activity we are going to identify six innovative ways of structuring volunteer work. Some of these approaches will be quite familiar to you while others may be new because they are just now beginning to emerge.

Wrap-up:
Ask if anyone would like to share a success story in using any of these approaches. If time permits, conduct a large group discussion using the following questions:

- To what boomer characteristics or volunteering preferences do each of these structures appeal?

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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1.   __ I __ __ U __ __

     __ __ L __ __ T __ __ R __ __ __

2.   J __ B

     S C __ __ P T __ __ G

3.   S E __ __ - D __ __ __ __ T __ D

     __ E __ __ S

4.   __ A __ __ L Y

     __ O __ __ __ T __ E __ I __ __

5.   __ I __ G __ __ S

     __ __ __ U __ T __ __ __ I __ __

6.   __ __ R K __ L __ __ E

     __ O __ U __ __ E __ R __ __ G

Learning Activity 7:
Innovative Structures for Volunteer Opportunities
Handout 7.2

1. Virtual Volunteering

- Volunteering conducted via the Internet and a computing device such as a desk computer, laptop or blackberry. Virtual volunteering appeals to the boomer's desire for flexibility regarding when and where they volunteer. It also enables boomers to make use of their technology skills.
- For More Information:
  o ServiceLeader.org, http://www.serviceleader.org/new/virtual/

2. Job Sculpting

- Job sculpting is the process of customizing an existing position or creating an entirely new one in order to make the best use of the skills and preferences of a specific volunteer. It allows boomers to utilize specialized skills, be more involved in the design of their work and make a unique contribution.
- For More Information:
  o "The Art of Job Sculpting". Webinar offered by Temple University's Center for Intergenerational Learning. www.ciltraining.org

3. Self-Directed Teams

- Self-Directed Teams are groups of volunteers who manage themselves and the work that they do with the facilitation of an outside coach. Many boomers worked in teams during their career. Team working makes it possible for boomers to form collegial relationships, use specialized skills and to exercise self-direction.
- For More Information:
  o "Fostering Civic Engagement through Self-Directed Teams, 2006-2007 Program Report", Wisdom Works, NCOA, 2008 https://www.ncoa.org/Downloads/WWReport.pdf
  o "Are Self-Directed Teams Right for Your Organization" and "Implementing A Self-Directed Team". Webinars presented by Temple University's Center for Intergenerational Learning. www.ciltraining.org

4. Family Volunteering

- Family volunteering is when people volunteer together as a family. It enables boomers to pass on civic values and to spend more time with family, particularly grandchildren.
- For More Information:
  o FamilyCares, Points of Light Foundation. http://www.familycares.org/involve/default.cfm

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5. Singles Volunteering

- Singles volunteering allows unattached adults to make a difference while also meeting new people. It appeals to boomers who have lost a spouse or are recently divorced.
- For More Information
    - Singles Volunteers, Inc. http://www.singlevolunteers.org/

6. Workplace Volunteering

- Workplace volunteering is when employees volunteer in the community representing their place of employment. It is an effective strategy for engaging boomers since many plan to continue working well into the traditional retirement years.
- For More Information:
    - Community Connections: Resources on Workplace Volunteering, Points of Light Foundation. http://www.pointsoflight.org/networks/business/cvc/communityconnections/2004-10-13.cfm

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Learning Activity 8: Sweetening the Deal

Audience: All Audiences

Goal:
Traditionalist volunteers didn't expect much reward for exercising their civic duty. An occasional "thank you" and recognition at the annual banquet were often enough for them. Boomers, on the other hand, will probably be looking to get something more out of their volunteer experience. The goal of this activity is to help participants brainstorm boomer-friendly, low-cost incentives and enrichment activities they might offer to more effectively attract and retain boomer volunteers.

Objectives:
After this learning activity participants will be able to:
- List incentives and enrichment activities that would appeal to boomers.
- List resources in the community where in-kind or low-cost incentives and enrichment activities might be obtained.

Time: 45 minutes

Handouts:
- Handout 8.1

Instructions:
1. Present the introduction.
2. Distribute Handout 8.1; ask participants as small groups to brainstorm 1. possible incentives or enrichment activities in each of the areas listed and then 2. where in their communities they might find these enhancements on an in-kind or low-cost basis
3. Wrap-up the activity (see below).

Introduction:
The traditionalists were motivated by civic duty and a strong desire to be a part of our organizations. Mileage reimbursement, an occasional "thank you" and recognition from the executive director at the annual banquet were enough for them. Boomers who are motivated by self-fulfillment may be looking for more tangible rewards from their involvement.

Some boomers will be looking for incentives. An incentive is a tangible or intangible reward intended to attract, retain and motivate a volunteer. Incentives take many forms such as simple recognition, expense reimbursement, gifts, cash-equivalent rewards and stipends.

Boomers may also be expecting enrichment activities. These are structured activities that add value to the volunteer experience and enable volunteers to learn and grow. Examples of enrichment activities would include social events, leadership development training and personal growth workshops.

Incentives and enrichments don't have to be expensive as we will see in our next activity.

Wrap-up:

Ask if anyone would like to share an insight or comment with the large group. Point out that although we have been talking about tangible rewards the power of a timely, sincere "thank you" should not be overlooked. If time permits, conduct a large group discussion using the following questions:

- What are some of the incentives and enrichment activities that you offer your volunteers?

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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Learning Activity 8:
Sweetening the Deal
Handout 8.1

Level of Impact	Possible incentives or enrichments	Where the incentives or enrichments might be found for little or no cost
Physical	e.g. health screenings	e.g. local hospital
Career		
Financial		
Social		
Intellectual		
Psychological		
Spiritual		

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Learning Activity 9: Managing Boomers

Audience: All Audiences

Goal:
The top-down, directive management style of the past is unlikely to work well with the boomers. What is needed today is a more facilitative style that respects what boomers bring to the table and invites them to become equal partners with staff in deciding how problems will be solved. The goal of this learning activity is to help participants assess just how facilitative their management style is.

Objectives:
After this learning activity participants will be able to:
- Discuss why a more facilitative management approach is called for with the boomers.
- Describe the "directive" and "facilitative" management styles.
- Assess just how facilitative their management style is.

Time: 45 minutes

Handouts:
- Handout 9.1

Instructions:
1. Present the introduction.
2. Distribute Handout 9.1; instruct participants as individuals to fill out the self-assessment as honestly as they can. Assure them that they will not have to share their scores with anyone.
3. When everyone has completed the self-assessment instruct participants to discuss in small groups how they might strengthen their facilitation skills.
4. Wrap-up the activity (see below).

Introduction:
In the past we have taken a directive approach to managing people 50+. Volunteer managers or supervising staff have delegated the work, specified how it should be done and made most of the on-the-job decisions. Traditionally, staff have been the "thinkers" and volunteers the "doers". The traditionalists went along with this but boomers are unlikely to do so.

Directive management is characterized by positional authority, unilateral decision-making and command and control. An alternative to this approach that makes more sense for boomers is called "facilitative management". A facilitative manager builds the capacity of individuals and teams to take action and solve problems on their own. This approach is characterized by influencing without taking over the reins, shared decision-making and facilitating the processes of others.

In this next activity you are going to use a self-assessment to see just how facilitative a manager you are. Try to answer this inventory honestly. You won't turn it in or have to share your score with anyone else.

Wrap-up

Reassure the group that directive management skills were very appropriate for the traditionalists and in some situations are still called for today. Point out that it takes time to change our management style. Honestly assessing our current behavior is the place to begin. If time permits, conduct a large group discussion using the following questions:

- What is the difference between "giving up control" and "giving up authority"?

- What are the implications of this exercise for your particular organization?

- What actions might you take as a result of this exercise?

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	Yes	No	Not Sure
I often employ active listening skills such as open-ended questions or paraphrasing when talking to volunteers			
I first ask volunteers what <u>they</u> think we should do when they come to me with a problem			
I assume that volunteers are just as intelligent and capable as paid staff			
I am more trusting than distrusting of volunteers			
I can usually let go of a task and not worry if it will be done correctly when I delegate it to a volunteer			
I encourage volunteers to be more self-confident and not to become dependent on me			
I encourage volunteers to be creative and innovative			
I can usually give feedback to volunteers without them becoming defensive			
I actively solicit feedback from volunteers through informal conversations, suggestion box, surveys, etc.			
I think volunteers feel free to disagree with me			
I try to avoid exerting the power of my position and instead rely on personal influence			
I do not withhold information from volunteers that is directly relevant to their work			
I am known as someone who is reasonable and with whom you can negotiate			
I try to involve all volunteers affected by a decision into the decision-making process			
I try whenever possible to make decisions by consensus			
I see my role as developing people			
I can be in volunteer committee or team meetings without feeling like I have to take over the reins			
I often create volunteer teams or committees			
I have a good understanding of group dynamics			
I know how to coach volunteer teams or committees to become self-managing			

If most of your answers were "yes's"… your management style is already quite facilitative. You should find that boomers respond to you very well.

If most of your answers were "no's" …your management style is not very facilitative. You may find boomers to be a challenge. Take some time to reflect upon your management philosophy particularly in light of what you have learned about boomer generational characteristics and the changing paradigm of civic engagement.

If most of your answers were "not sure's"…you may want to observe your management style more closely. Ask for feedback from others.

Learning Activity 10: Creating Change in Your Organization

Audience:
RSVP, FGP and SCP Community Partners

Goal:
Senior Corps programs can not successfully engage boomers by themselves. They need their community partners to engage in a process of organizational change. Previous learning activities have made the case for the need to do business differently. The goal of this learning activity is to assist partners in beginning to create a workable plan of action.

Objectives:
After this learning activity participants will be able to:
- Create a communications plan
- Create an implementation plan

Time: 45 minutes

Materials:
- Activity Handout 10.1

Instructions:
- Present the introduction.
- Distribute Handout 10.1; ask participants as individuals to fill-out parts 1 and 2 of the worksheet.
- Once participants are done working, instruct them to share with their small group one program improvement they intend to make.
- Wrap-up the activity (see below).

Introduction:
Throughout this training we have been talking about the very different volunteer preferences and expectations of the boomers. We have made the case for changing how we do business in order to engage this new generation of people 50+.

We know that volunteer managers and other non-profit staff are extremely busy just keeping their organizations running. There may seem to be little extra time for doing the work that needs to be done to engage boomers. The pay-off to our organizations from attracting boomers, however, can be huge. And the good news is that boomers can be the solution to the challenge they pose. We can engage boomer volunteers in helping us to identify and make the necessary changes.

In this learning activity we are going to take the time we never seem to have during a normal work day to do some thinking about how our own organizations might need to change to engage boomers in greater numbers.

Wrap-up:
Ask if anyone would like to share an insight or comment. If your Senior Corps program can provide your partners with technical assistance or additional training announce that now. If time permits, conduct a large group discussion using the following questions:

- Now can we as non-profits work together in this community to engage boomers?

- How might we stay in contact and share ideas?

- How might your Senior Corps partner be of assistance?

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Part 1 – Communications Plan
How will you share what you have learned today with key people in your organization?

Target Audience	Key Message	Delivery Method	Action You Want Them To Take	Target Date
Direct Supervisor				
Executive Director				
Key Board Member(s)				
Other Staff				

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Part 2 – Implementation Plan

What are the two most important program improvements you want to make as a result of what you have learned today?

	Program Improvement #1	Program Improvement #2
What is the Nature of the Improvement?		
Whose Approval Is Needed, If Any?		
What are the Initial Action Steps?	1. 2. 3. 4. 5.	1. 2. 3. 4. 5.
Who Can Help You Get the Work Done		
Where Will You Find Funding, If Needed?		
What Resistance Might You Encounter?		
What Is the Targeted Completion Date?		

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Invitation Letter

(Date)

(Name)
(Organization)
(Address)

Dear (Name),

I am pleased to invite you to "The Boomers Are Here!" a workshop presented by (SENIOR CORPS PROGRAM). The training will be held on (Date) from (Time) to (Time) at (Venue) located at (Address). You can register for the workshop by calling (Phone Number) by (Date). There is no registration fee but advance registration is required.

These are tough times for nonprofits. Funding is scarce and most organizations are understaffed. But there is one overlooked resource and it is growing more abundant all the time: boomer volunteers. As more and more boomers begin to cut back on their working hours there is a growing pool of expertise that can be tapped into to help nonprofits remain vital even in the most trying of economic times.

But we can't unlock the potential of boomer volunteers using the opportunities and management styles of the past. Their skills and preferences are just too different from the traditionalists, the "super volunteers" now aging out of our programs. We need a new approach.

Attend "The Boomers Are Here!" and learn how to attract and retain boomer volunteers. You will take part in interactive, learning activities that will help you understand what boomer volunteers are looking for, assess your readiness to engage them and create an action plan for the future.

Don't miss out on this great opportunity. Register today by calling (Phone Number). If you have any questions about the training don't hesitate to call me at (Phone Number).

(Attach Workshop Agenda)

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Glossary

50+-
A designation for anyone over 50 years of age. Includes both boomers and traditionalists. An alternative to "seniors" or "older adults".

Boomers
The generation also known as "baby boomers" born between 1946 and 1964. Boomers are often sub-divided into leading edge boomers (born 1946 to 1955) and trailing edge boomers (1956-1964). The term as used in this toolkit primarily refers to leading edge boomers.

Civic Engagement
Term that is increasingly preferred in the aging community to refer to a comprehensive strategy of engaging 50+ adults to address public concerns. Encompasses unpaid volunteering, service with a stipend and encore careers in the public interest.

Communications Plan
How a participant will share information learned in a workshop with key members of his/her organization.

Community Partners
Organizations or stations where Senior Corps members are placed.

Directive Volunteer Management
The top-down, command and control approach to managing volunteers. Assumes that volunteers are less knowledgeable or experienced than staff and therefore need to be directed and closely supervised. Tends to result in low-level, defined positions with set procedures and strict rules.

Enrichment Activities
Structured learning or personal development activities that add value to the volunteer experience and increase retention. Examples would include social activities, leadership development training and onsite personal enrichment courses.

Facilitative Volunteer Management
An approach to managing volunteers that builds the capacity of individuals and groups to take action and solve problems on their own. Assumes that when volunteers are just as knowledgeable or experienced as staff they should be given a greater degree of self-management.

Family Volunteering
Providing opportunities for people to volunteer together as a family or with significant others.

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Forgotten Boomers
Used in this toolkit to refer to low-income, less-educated and often non-native English speaking people who do not fit the popular stereotype of the boomers.

Generational Theory
The idea that people who come of age during the same time period and experience the same defining events tend to hold similar attitudes and preferences which remain constant over time. Based on the groundbreaking work of William Strauss and Neil Howe.

Implementation Plan
How a participant will put into action what he or she has learned in the training.

Incentives
Tangible and intangible rewards designed to attract, retain and motivate volunteers.

Job Sculpting
A borrowed and somewhat redefined term from the world of business. Used here to refer to the customization of an existing role or the creation of an entirely new one in order to best utilize the unique skills and preferences of a specific volunteer. Provides a volunteer with options when he or she is not interested in an organization's existing opportunities.

Learning Activity
A learning activity is a structured, interactive exercise designed to help participants reach specific learning outcomes.

Paradigm
A pattern of thinking. Specifically the common assumptions and practices that define volunteer management at any particular time.

Self-Directed Team
A group of volunteers who manage themselves and the work that they do with the assistance of an outside coach. Self-directed teams assume many of the functions of a traditional manager. Also known as self-managing or empowered teams.

Singles Volunteering
Volunteer opportunities specifically designed for unattached adults who want to meet others while doing something good for the community.

Time Flexibility
Giving volunteers more options regarding when they volunteer. Providing alternatives to volunteering at the same time and same day each week.

Traditionalists
Traditional volunteers of the Senior Corps programs. Refers to volunteers born between 1915 and 1945 also known as the Silent Generation.

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Virtual Volunteering
Volunteering conducted via the Internet and a computing device such as a personal computer, laptop or blackberry. Virtual volunteering can take place from home, work or while vacationing; anyplace where the Internet can be accessed.

Workplace Volunteering
Employees volunteering under the auspices of their employer on their own or release time. Since boomers plan to work well into the traditional retirement years the workplace will become more important when recruiting people 50+.

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Workshop Evaluation Form

1. For each of the following statements, please indicate your opinion by circling the appropriate rating number to the right.

Statement	Strongly Disagree	Somewhat Disagree	No Opinion	Somewhat Agree	Strongly Agree
The trainer was engaging	1	2	3	4	5
The trainer was clear and easy to understand	1	2	3	4	5
The trainer responded well to questions	1	2	3	4	5
The topics covered were valuable	1	2	3	4	5
The time allotted for the planned activities was sufficient	1	2	3	4	5
The exercises were effective	1	2	3	4	5
The meeting room was comfortable	1	2	3	4	5

2. Overall, how would you rate this workshop: (Please circle)

Poor   Fair   Good   Excellent

3. Please indicate the degree of change this training has made in regard to each of the items below. Please rate where you stood with each item before and then after the training.

Before Training Low High					My **knowledge** of:	After Training Low High				
1	2	3	4	5	The generational characteristics of boomers	1	2	3	4	5
1	2	3	4	5	The volunteer preferences of boomers	1	2	3	4	5
1	2	3	4	5	The diversity of boomers	1	2	3	4	5

Before Training Low High					My **skill** to:	After Training Low High				
1	2	3	4	5	Evaluate whether an opportunity will be attractive to boomers	1	2	3	4	5
1	2	3	4	5	Assess how prepared my organization is for engaging boomers	1	2	3	4	5
1	2	3	4	5	Collaborate with and empower boomer volunteers	1	2	3	4	5

| Before Training | | | | | My **attitude** concerning: | After Training | | | | |
Low				High		Low				High
1	2	3	4	5	The kinds of tasks I would be willing to turn over to a boomer	1	2	3	4	5
1	2	3	4	5	Having to change how I do things in order to accommodate the boomers	1	2	3	4	5
1	2	3	4	5	The urgency of making changes now so my organization does not miss out on this opportunity	1	2	3	4	5

| Before Training | | | | | My **motivation** to: | After Training | | | | |
Low				High		Low				High
1	2	3	4	5	Educate my ED and fellow staff about engaging boomers	1	2	3	4	5
1	2	3	4	5	Make changes to help my organization better attract and retain boomers	1	2	3	4	5
1	2	3	4	5	Create a boomer engagement action plan for my organization	1	2	3	4	5

4. What additional training would you like to receive on engaging boomers or related topics?

5. Would you like to see the participants in this training continue to work together around the topic of boomer engagement? _____ No _____ Yes

If "yes" what form might that collaboration take:

6. Do you have any additional comments about this training?

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