

NGA Policy Academy on Civic Engagement
Older Adults, Baby Boomers, and Volunteerism
Annotated Bibliography

Bridgeland, J.M., Putnam, R.D. & Wofford, H.L. (2008). More To Give. Tapping The Talents Of The Baby Boomer, Silent And Greatest Generations. AARP. 3-35.

The study identified motivating factors for older adult in volunteering, as well as barriers and ways to overcome them, and potential roles for government. Identified motivating factors included the desire to help others and “give back,” and the desire to stay active. Civic engagement experiences through faith-based organizations were the most desired, followed by tutoring or mentoring young people and helping the elderly to remain in their homes. Identified barriers to success included: not having been asked to volunteer; needing flexible scheduling; the desire to help others directly to solve their problems; lack of time; need to earn an income; wanting to find an opportunity that matches their skills and experience; transportation issues; and discomfort working with strangers. Means to overcoming such barriers included: creating a “civic highway” of opportunities; calling together a summit of non-profits and corporations to understand the role that aging Americans can play in their organizations; offering incentives, such as educational credits for younger people, creating flexible scheduling opportunities, and recruiting volunteers while still in the workforce.

A beginning role for the government to play includes creating a bureau or position dedicated to increasing volunteer service. Government can also help with incentive programs including providing free transportation, increasing the mileage reimbursement, and property and real estate abatements and tax credits. Another concept is the creation of a “Volunteer Generation Fund” that would provide grants to faith-based and non-profit organizations to help in their recruitment, training and retention of volunteers. The article also offered examples of successful programs such as Silver Scholarships that provide education credits to younger people; Experience Corps, which recruits older Americans to mentor younger students and provides a stipend; and Encore Fellowships, which places aging Americans in high needs areas such as healthcare, education, non-profits, and government.

Foster-Bey, Grimm & Dietz (2007). Keeping Baby Boomers Volunteering. A Research Brief on Volunteer Retention and Turnover. Corporation for National and Community Service.

The article outlines key issues in recruitment and retention of older volunteers, specifically focusing on the unique issues of the Baby Boomer population. Baby Boomers in their 40’s and 50’s are volunteering at higher rates than previous generations were at the same age. Additionally, Baby Boomers’ volunteering trends are focused more on children and adolescents, whereas cohorts before them were more likely to engage in political activities and groups. This may be attributed to Baby Boomers having children at older ages, thus remaining engaged in the school system and with youth later in to life. As to why Baby Boomers remain engaged in volunteer opportunities, explanations described in the article include: whether or not the person is attached to volunteering and how much time they spend engaged; whether the volunteer experience fits with the Baby Boomers’ needs and expectations; and the types of family and work commitments that a person has in addition to volunteering. To retain volunteers, the mindset regarding the capabilities and importance of volunteers to an organization must be changed so that they are considered to be as important as paid employees. The article lays out that volunteers should be made to feel useful, necessary, and connected to the organization; they should be thoroughly trained, and human resources personnel should be dedicated to volunteer recruitment and support.

Grimm, R., Spring, K. & Dietz, N. (2007). The Health Benefits Of Volunteering. A Review Of Recent Research. Office of Research and Policy Development, Corporation for National and Community Service.

A research review of the benefits that people accrue as a result of becoming or remaining civically engaged. Volunteering is shown to contribute to better overall physical and mental health. Those who volunteer have a lower mortality rate, greater functional ability, and lower depression rates later in life than those who do not volunteer. In addition, it is shown that older adults receive the greatest benefit from volunteering. The reasons may include that older volunteers greatly benefit from the social and physical activity, as well as creating a needed “sense of purpose.”

Harvard School of Public Health. (2004). Reinventing Aging. Baby Boomers and Civic Engagement. MetLife Foundation.

Extensive report that outlines characteristics of Baby Boomers as they relate to civic engagement, and also identifies mechanisms for recruitment and retention. Points of interest include: the age of retirement is increasing due to economic problems, prohibition of mandatory retirement, and lack of faith in social security, which leads people to remain in the workforce. Volunteering is shown to peak during midlife and dwindle during retirement, with the exception of those who begin volunteering early in retirement – they then are more likely to remain volunteering. The article suggests a national campaign that focuses on Baby Boomers and encourages them to find meaningful volunteer opportunities that will give them purpose late in life. Researchers also suggest the creation of a “Civic Engagement” plan at the end of one’s career, similar to other retirement plans they may be making. This would lessen the tendency of retirees to fill their days with other activities and cease to have time for volunteering. In addition, new language and images need to be developed that picture seniors as active and healthy, as opposed to frail and needy. The entertainment industry can aid in this charge by portraying aging as positive and expanding the definition of what aging means. Finally, the article outlines the need to develop varied volunteer opportunities such as: in the professional realm, to include a range of opportunities with varying time commitments; in intergenerational programs; and in the community, to include the creation of community empowerment initiatives that focus not just helping an agency, but helping neighbors, community members, and fill community needs.

Hoffman, L. (2008). Issue Brief: Increasing Volunteerism Among Older Adults: Benefits And Strategies For States. NGA Center for Best Practices, 1-13.

The issue brief discusses the benefits associated with volunteering and practices that can contribute to the recruitment and retention of volunteers. Potential health and wellness benefits include: social engagement; offset feelings of loss; soften aging effects; and reduce depression. The public benefits in that volunteers exhibit high skill level and productivity, organizations report cost savings, volunteers caring for community members and family members reduces hospitalizations and increases the time spent in home and children and aging volunteers mutually benefit from time spent with each other. Some of the reported challenges to recruitment and retention include a lack of connection to opportunities, changing strategies to include a large number of volunteers performing less hours -- as opposed to fewer volunteers with more hours, finding opportunities in a professional setting, insufficient funding for training, and lack of transportation. Solutions to overcome these barriers include: encouraging workforce commitment to volunteering, online clearinghouses with opportunities, encouraging volunteering in public employees still working, provide transportation and discounts and promoting intergenerational volunteering.

Kaskie, B., Imhof, S., Cavanaugh, J. & Culp, K. (2008). Civic Engagement As A Retirement Role For Aging Americans. *The Gerontologist*, 48(3), 368-377.

A group of older Americans were surveyed regarding their civic engagement practices and were segmented in to three categories: (1) those who are not working or volunteering; (2) those who returned to work part-time or seasonally; and (3) those who volunteered less than five hours a week. The objective of the study was to identify characteristics of engaged groups versus those who are not engaged, and lend research toward the concept of civic engagement as a retirement role. The findings show that those who are engaged differed from the other two groups across 24 variables; in particular, they were in better mental health, had higher education, and were in better physical health. Further, those who were engaged were more aware of other volunteer opportunities. Suggested implications from the research include: the importance of making opportunities known and asking people to volunteer, and offering non-cash incentives for those who volunteer more than 10 hours per week.

Lindblom, D. (2001). Baby Boomers and The New Age of Volunteerism. Corporation for National Service, Senior Service, ii-30.

<http://nationalserviceresources.org/files/legacy/filemanager/download/465/lindblom.pdf>

This publication was sponsored by the Corporation for National Service. The focus of the report is on the creation of a new infrastructure that can be used to recruit and retain Baby Boomer volunteers. Researchers interviewed Baby Boomers in Minnesota to qualitatively assess their opinions and develop new techniques. The findings suggest generating a change in the perception of what volunteering looks like and means in terms of the Baby Boomer population through marketing campaigns that portray the population as an asset to society. Additionally, the authors advocate for the creation of an infrastructure that matches the needs, skills, and desired time commitment of Baby Boomers with opportunities in their community. The use of incentives was suggested in the form of banking hours, time dollar, using a buddy system to

complete time commitments, and offering incentives that cater to their needs such as discounts on prescription medicine. The article also addresses the heterogeneous nature of the Baby Boomer population by segmenting it into categories based on their retirement preparedness status and feelings toward retirement.

Lipman Hearne Inc. (2003). RespectAbility: Non-Profit Leadership Interview Report. National Council on the Aging. 1-26.

<http://www.respectability.org/attachments/CEOInterviews.pdf>

A National Coalition on Aging research report that interviewed 20 executives in an effort to gain understanding about demographic trends, uses of volunteers, efforts to recruit and retain, challenges to initiatives, and solutions to challenges. The findings indicated that Baby Boomers' patience, professionalism, and reliability make them suited and sought after in non-profits. To overcome barriers that currently exist it is necessary to redefine the concept of "senior volunteers;" change volunteer opportunities so that they allow Baby Boomers to make an immediate, noticeable impact; allow for flexible scheduling; begin volunteer recruitment at the local level; hire individuals whose primary job description is volunteer coordination; collaborate with nonprofits in cost sharing techniques; and use older workers in more influential roles.

MetLife Foundation (2007). Promising Practices In Engaging Older Volunteers. National Association of Area Agencies on Aging, 2-20.

http://www.n4a.org/pdf/2007_VolunteerPrograms_AwardsBook.pdf

Summarizes 14 volunteer programs from across the country that received awards based on their excellence. Among the honorees for 2007 are programs that use an intergenerational approach to helping frail older adults remain in their homes by receiving volunteer assistance with transportation, grocery shopping or companionship. Other winning programs utilize older volunteers to tutor and mentor at-risk children, or provide respite care to family caregivers. Some of the keys to successful programs include offering flexible hours for volunteers, providing opportunities that are fulfilling and that utilize the volunteers' skills and interests, and reaching computer-savvy volunteers through websites and online bulletin boards. Other winning volunteer programs note that "word of mouth" was their best recruiting tool, showing that if you build it, and build it well, they will come! The purpose of *Promising Practices in Recruiting and Engaging Older Volunteers* is to disseminate proven approaches to strengthen the capacity and effectiveness of volunteer programs through recruitment, training, retention and recognition of older volunteers, and program sustainability.

McBride, A.M. (2007). Civic Engagement, Older Adults and Inclusion. The American Society on Aging, 30(4), 66-71.

McBride addresses the definition of civic engagement, how civic engagement is an integral part of our American history and how at the same time, it can be an exclusive form of involvement. Groups who may be excluded include those with health and mobility problems; low-income Boomers caring for parents as well as children; Boomers who may need to work longer due to minimal pensions, having dependents longer and wages that may not have adjusted with inflations; and Boomers of color who have not be adequately represented on board or in the volunteer force (with the exception of faith-based volunteering opportunities). Suggested is a model for civic engagement that allows for all people with an interest in volunteering in some capacity having the opportunity to do so. This will be possible through addressing the five dimensions of access, information, expectations, incentives and facilitation. *Access* refers to the creation of opportunities for all aging Americans based on their skills, time constraints, physical constraints and interests. *Information* refers to making older Americans knowledgeable about opportunities and expectations of volunteering. *Expectations* are the norms that are created about civic engagement as an all-inclusive activity for older Americans. *Incentives* are intrinsic and extrinsic rewards that volunteers receive. Extrinsic rewards and intrinsic rewards (i.e. “giving back) combined is the most effective technique. Finally, *facilitation* is the support that volunteers receive that allows them to sustain their position.

Rochester Area Community Foundation (2007). Connecting Seniors for Tomorrow’s Community, Community Assessment Report. Rochester, NY

The Report outlines the barriers and opportunities to civically engage seniors in the greater Rochester community in an effort to plan future initiatives to increase engagement, based on assets the community possesses. The assessment was conducted by an identified Expert Panel, as well as focus groups of Rochester seniors. The final report includes a demographic breakdown of the older population in Rochester, fifteen prominent barriers to engagement, focus group results, six major findings and eight action steps.

Identified barriers and suggestions for overcoming them: Identified barriers were wide-ranging and include: a lack of opportunities in one’s specific neighborhood; transportation; lack of information or access to it; mobility or self-care barriers; lack of stimulation in offered programs; language and cultural barriers; housing problems (high housing costs and limited options); time constraints; competition for time with media – e.g., television and computer; restrictions on political engagement and advocacy by federally funded programs; low self-esteem; organization difficulties; lack of focus on civic engagement by government and other agencies; narrow definition of civic engagement; and not being asked to volunteer. When asked, the seniors provided the following suggestions for overcoming barriers, including: using a team volunteering approach, flexible assignments, adding a personal touch to requests, and providing more information about opportunities.

Major findings: The six major findings of the report included that seniors account for a large percentage of the total population in Rochester; the group is not homogenous and have different needs and situations; civic engagement improvements need to stem from systems changes; the community has assets that need to be sustained and enhanced; the barriers to civic engagement should be addressed on a community level; and there are clear factors that draw seniors to

volunteering or push them away, and such factors should be acknowledged and utilized in planning.

Action steps: The eight action steps include: create an ongoing open discussion to advance engagement with seniors; disseminate the information gathered in the assessment and build support for future plans; undertake a possible additional assessment to include specific organizational attributes (as opposed to the community in general); organize a conference on volunteerism; begin to address the transportation problems and needs in the community; design and implement a mentoring program for seniors in the city school district; plan to make improvements in employment, housing, and public services to encourage senior civic engagement; and develop a public information campaign.

Roper, ASW (2004). Baby Boomers Envision Retirement II- Key Findings. Survey of Baby Boomers' Expectations for Retirement. Knowledge Management, 1-13.

<http://www.aarp.org/research/work/retirement/aresearch-import-865.html>

This report provides the results of a survey conducted five years after the original study in 1998 to examine Baby Boomers' thoughts on retirement, including the topic of civic engagement. Findings indicate that Boomers who have a strong interest in volunteering while still in the workforce are more likely to remain interested in retirement, and 62 percent of boomers who are currently volunteering are planning to increase volunteering efforts in retirement.

Saint Paul Foundation (2007). The Civic Engagement Of Baby Boomers: Preparing For A New Wave Of Volunteers. Community Assessment Report, 1-82.

<http://www.wilder.org/download.0.html?report=1979>

The article examined barriers to volunteerism and engagement as well as identified motivational reasons behind Baby Boomers volunteering. Barriers included: the inability to invest staff and resources in coordinating, training and recruiting volunteers; difficulty recruiting volunteers for daytime activities; lack of funds to support volunteers; recruiting a sufficient number of volunteers and finding those that have the adequate or appropriate skills. Motivational factors that influence volunteering included wanting to "give back"; spiritual reasons, sense of responsibility, and social support. Uniquely identified in this article was a Baby Boomer-specific need of wanting to "leave a legacy" and their motivation to volunteer having less to do with feeling that it is their civic duty and more to do with wanting social interaction, their emotional well-being, self-esteem, and intellectual stimulation.

Thompson, E. & Wilson, L. (2003). The Potential Of Older Volunteers In Long-Term Care. The American Society on Aging, 25(1), 58- 63.

The article discussed the need to engage older volunteers in aiding in long-term care. For the 500,000 currently retired physicians and nurses, researchers suggested adjusting policies regarding licensing and supervision to encourage them to volunteer their services. Additional suggestions included: lower the eligibility age to volunteer; try programs without income restrictions; and vary the amount and types of services opportunities. The article also used the example of Experience Corps as a model to be used more frequently. The goal of Experience Corps is to allow aging adults to remain in their homes for as long as possible through providing

volunteer support. They offer small stipends for intensive commitments, travel reimbursement and supplemental health insurance. Intensive volunteers are used to provide training, recruiting and service enhancement of other volunteers. Recruitment is done through mailings with utility bills, mailings with AARP, newspaper articles and ads in employment sections. Suggestions included partnering with local universities to create training institutes, recruit and train jointly with other organizations, and allow trained volunteers to take on leadership and managerial roles.

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