

ABSTRACT

Baby boomers want and expect more from their volunteer experience. They are eternal optimists about the future, exude a "we can do anything" spirit, are individualistic in their personal pursuits, openly question authority and are reformers. Baby boomers are redefining the meaning of retirement and volunteer service. Organizations must now compete with each other to attract and retain a better educated, diverse and outcome focused baby boomer generation. Attracting and retaining baby boomers as volunteers will require organizations to redefine and reframe their message. The internal operational paradigm of service must be refocused to include the transference of knowledge from the workplace to meaningful community service, provide a role for decision-making within the organization and generate flexible meaningful roles that facilitate personal growth and service learning. The University of Maryland Center on Aging in collaboration with the Corporation for National and Community Service and AARP (formerly known as American Association of Retired People) facilitated the development of several national demonstration models to determine the best practices in recruiting and retaining baby boomers as volunteers, including The Leadership Institute for Active Aging, a service learning model implemented in West Palm Beach, Florida through the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. The history, conceptual thinking, curriculum and program administration approaches are detailed along with outcome measurements.

The Leadership Institute for Active Aging: A Volunteer Recruitment and Retention Model

Laura Wilson, Jack Steele,
Estina Thompson, and Cathy D'heron

INTRODUCTION

The first wave of baby boomers, 77 million strong, begins to turn 65 in the year 2011 (Older Americans, 2000) and they are unlike any other previous generation. Their collective voice has affected and will continue to affect public policy and consumer spending and will redefine retirement and leisure. The future of senior service and volunteerism will be dramatically impacted by current demographic trends. These trends are having a riveting impact on our entire social and economic infrastructure. Baby boomers are not attracted to many of the traditional roles

often relegated to volunteers such as stuffing envelopes, answering the telephone or making photocopies. Existing organizational cultures and programs that engage volunteers will need to change in order to leverage the potential of this critical human resource.

The normative or traditional approach to volunteerism has not kept pace with these social, economic and technological trends and the values of the new generation of volunteers. The traditional approach embodies an over reliance on, and perpetuates several myths: (1) that the community understands what your organization is all about; (2) that

Jack Steele is the Associate Executive Director of Retired and Senior Volunteer Programs International and development officer for the Center on Aging at the University of Maryland College Park. Prior to coming to Maryland, he served as Associate Executive Director of the Palm Beach/Treasure Coast Area Agency on Aging in Palm Beach County, Florida. He holds a master's degree in gerontology.

Laura Wilson has been Director of the Center on Aging at the University of Maryland College Park since 1987. The focus of her research, evaluation and demonstration projects has been senior service and volunteerism. She has been the project director for the National Eldercare Institute on Employment and Volunteerism, technical assistance provider to Experience Corps for Independent Living and project director for the AmeriCorps National Skills provider for Independent Living. She is a member of the Association of Volunteer Administration.

Estina Thompson is an Assistant Professor in the Department of Public and Community Health at the University of Maryland. She is an affiliate faculty member of the Center on Aging and specializes in barriers to accessing services.

Cathy D'heron is Executive Director of the Area Agency on Aging of Palm Beach/Treasure Coast, Inc., in Palm Beach County, Florida. The volunteer program division of this Area Agency administers the Experience Corps for Independent Living project, a Foster Grandparent Program and an RSVP program. She holds a Master's Degree in public administration.

existing recruitment plans that have worked well in the past will continue to attract a new generation of volunteers; (3) that retention strategies such as annual recognition breakfasts will be enough to retain future volunteers; and (4) that the marketing of "one size fits all" service opportunities such as bus drivers or other low performing menial tasks will be sufficient to attract a new better educated, younger and highly individualistic volunteer. Organizational loyalty and brand name recognition, once a hallmark feature in the recruitment and retention of senior volunteers is less important to the new generation of volunteers. The resultant changes have insidiously eroded the once solid and dependable base of senior volunteers. A convergence of issues including an ever changing definition of retirement, a scarcity of young senior volunteers, increased competition for volunteers among organizations, governmental assistance straining to respond to increases in human needs, and the complex issues associated with creating change in volunteer-based organizations compels us to rethink our traditional approaches to the recruitment and retention of volunteers.

The need for change is now, before the vast majority of baby boomers begin to consider retirement. Exactly how baby boomers might respond to the years normally correlated with retirement is as lacking in predictability as the cohort of boomers themselves. What we do know is that the boomers, as the next generation of retirees, are better educated, healthier and have more financial resources. Shaped by a variety of shared experiences (e.g., Vietnam War, Watergate, Civil Rights Movement, Women's Movement, Environmental Movement), baby boomers reflect distinct life values that directly impact their expectations about the future. They tend to be eternal optimists about the future exuding a "we can do anything," spirit are individualistic in their personal pursuits, openly question authority, are reformers, and seek experiences that provide personal growth

and adventure (Keefe, 2001). Volunteerism is not viewed as a stationary, end of life commitment to fill one's free time. Retiring professionals now seek volunteer jobs as prestigious as their paying ones and want to participate in experiences that enhance and maintain their job skills (Tanz and Spencer, 2000).

The new generation of volunteers will expect more from their volunteer experience. Existing volunteer programs tend to focus on traditions and compliance, relying on individual and organizational loyalty. They often engage individuals seeking to volunteer in basic non-technical service-oriented tasks. Tried and true methods of volunteer recruitment have not changed significantly nor has there been large-scale innovation in incentives or retention activities.

To attract and retain the diverse group of potential volunteers that the boomers represent, diverse methods of recruitment and retention based on changing attitudes and emerging trends are needed. Developing innovative approaches which provide baby boomers with awareness of community-based needs while simultaneously responding to their own preferences for personal development and networking need to be tested now before the bulk of the boomer wave arrives.

One such innovative approach for recruitment and retention of the age 50+ volunteer has been implemented and tested over the last three years. The Leadership Institute for Active Aging was developed as a part of a national demonstration grant supported by the Corporation for National and Community Service and AARP (formerly known as American Association of Retired Persons) with technical assistance provided by the University of Maryland Center on Aging. The Leadership Institute is based at the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. in West Palm Beach, Florida.

The Leadership Institute for Active Aging provides the format to develop and test innovative approaches for recruiting a new genera-

tion of professional volunteers to expand the scope of volunteerism among community-based organizations. The Institute model (a) integrates and utilizes the expertise of institutions of higher learning, (b) expands community capacity to provide increased services to seniors, (c) creates a sense of community and camaraderie among volunteers, (d) offers volunteers more flexibility and more options for community involvement, (e) provides an organized infrastructure to attract and train a continuous stream of volunteer leaders, (f) provides an environment for active healthy aging, and (g) engages the volunteer in life-long learning and community service.

DEVELOPMENT OF THE INSTITUTE

The Leadership Institute for Active Aging created an advisory group to serve as a think-tank for program development by engaging the expertise of a broad spectrum of community partners. Membership includes community agencies, area agency advisory council members, volunteers, retired professionals, institutions of higher learning and area agency staff. This advisory group evaluated the merits of existing volunteer best practices, explored the reasons why service is not an attractive option for baby boomers, and assessed community need before choosing the Leadership Institute model.

As a part of the planning process, considerable time was spent in carefully selecting a program name to attract a diverse group of participants and to create a marketing niche with broad appeal to the younger 50+ individual. Each word was designed to convey or impart a mental image to attract applicants and ultimately volunteers. The feedback from leadership institute students confirmed the significance of selecting a strategic name. The word "leadership" was attractive to those seeking an opportunity to reengage in meaningful work where they could apply their life-long professional and personal skills. The word "institute" signified continuous learning, a strong core value for the boomers and

near boomers. The word "active" resonated with those individuals who had become disenchanted with their retiree lifestyle of endless golf games and social clubs. The word "aging" is a time neutral term (versus elderly, older, senior) that progresses from birth and does not seek to designate a specific age cohort.

Three over-arching objectives were designed to determine the success of the Leadership Institute for Active Aging: (1) create a leadership model to expand community capacity to meet identified needs; (2) attract and retain experienced individuals through meaningful life-long learning and civic engagement activities; and (3) ensure replicability.

The Leadership Institute for Active Aging model is a framework to offer volunteers more flexibility and options for civic engagement, and better utilization of their professional skills. The Institute is also designed to offer communities expansion of services to older persons in the community in support of independent living, and to strengthen collaboration among community organizations.

RECRUITMENT OF PARTICIPANTS FOR THE INSTITUTE

The Leadership Institute accepts a total of 25 students per class. The application and screening process was intentionally designed to be competitive, mirroring the process of applying for a professional paid position. The first recruitment campaign netted over 75 applications attesting to the strength of the words "leadership," "institute," "active," and "aging." The ad in the local newspaper took a non-traditional approach to recruitment. It included words such as "learn and gain new skills," "cost of tuition underwritten," "a unique opportunity," "want to become involved in your community," and included a picture of active individuals over age 50. Many applicants were retired professionals who wanted to apply their skills in a meaningful productive environment. They

included retired CEOs, nurses, educators, marketing specialists, professional trainers and mid-level managers from various corporate sectors. An initial screening was conducted by telephone to ascertain the applicant's suitability for the program and their commitment to community service. Applicants successful at this stage were sent an application and scheduled for a team interview with staff and members of the Leadership Steering Committee.

Applicants were not given a specific volunteer assignment at the beginning of their institute experience. Applicants were challenged to discover their own special gifts and abilities and to create their own unique market niche within the community service system. This allowed for individualism, a hallmark trait of the next generation of retirees. Applicants later revealed that they appreciated the intensive application and screening process, which signified the importance of the program, therefore adding value to the experience.

Another program incentive designed to attract the baby boomer generation and current retirees was that of partnering with local institutions of higher learning. The pursuit of life-long learning opportunities has broad appeal to those applying to the Institute. The partnership between the Area Agency on Aging and local institutions of higher learning provides benefits for both organizations. The Area Agency on Aging receives free space, access to instructors and assistance with curriculum development. The institution of higher learning receives access to a new market of students, is able to showcase its programs and services and can have a participatory role in community extension services. Leadership students readily embrace the higher education learning environment, making comments such as "I feel young again," "I like being around the younger generation," "it's great going back to school," and "I can't wait to tell all my children and grandchildren that I'm going to college." The

higher education setting enhances the volunteer experience and further communicates value to the students. All classroom learning takes place on a college or university campus in the local community being targeted for both leadership recruitment and volunteer service delivery.

LEADERSHIP INSTITUTE TRAINING PROGRAM AND CURRICULUM

The Leadership Institute for Active Aging includes 80 hours of classroom training followed by a four-week internship in a community-based organization that focuses on the prevention and intervention of health related needs, the environment and social services. The intensive integration of life-long learning skills with meaningful service opportunities is intentional, designed to produce a committed long term volunteer who is more likely to engage in civic activities and community support services. The program is based on the concept that volunteers who are highly knowledgeable concerning community resources, have a good sense of their own self worth, and who understand the dynamics of volunteerism are more likely to make an ongoing volunteer commitment to communities to expand and enhance service capacity. Students report that if the program had focused solely on traditional volunteer roles they would not have been interested. What they like about the Institute is that they play an active role throughout the process, are provided numerous opportunities to express their opinion, participate in various aspects of program design and are provided choices for volunteer opportunities.

CURRICULUM DEVELOPMENT

The intent of the curriculum, which reflects the values of volunteerism and community service, is to be academically challenging, provide broad life-application and provide a forum among students for significant interaction that focuses on problem solving and community resources.

There are four categories of information in the core curricula. They are community resources, the aging process, self-worth and volunteerism.

- **Community Resources** provides information on navigating the aging network at the national, state and local level, the mental health community, program specific eligibility programs, local service matrixes, neighborhood based programs, long-term care options and the role of civic organizations.
- The **Aging Process** engages students in learning about disease and disability issues, normal versus abnormal aging, care giving, elder sensitivity training and prevention and intervention health issues.
- The **Self-Worth** track includes information on cultural diversity/competence issues, coping with loss, disengagement/reengagement theories, completing personal development profiles, understanding depression and affirmation of life-long learning.
- **Volunteerism**, the fourth core curricula area included leadership development training, conflict resolution skills, volunteer management, recruitment and retention strategies, understanding service impacts and outcomes and an overview of various organizational cultures.

INTERACTIVE LEARNING

Active student participation is an essential part of the adult cooperative learning experience. Students work in teams on creative problem solving activities and other group exercises resulting in an enhanced understanding of leadership, team work and collaboration skills. These small group experiences create camaraderie among students and facilitate the importance of understanding different learning styles and the art of interpersonal negotiation. The Institute includes continuous exposure to knowledge about various community organizations and resources. This occurs on two levels: (1) students are advised

of other community training opportunities and are encouraged to attend special conferences and seminars; and (2) representatives from community organizations are invited to make presentations about their programs during the course of The Institute. Presentations from representatives of these organizations are interspersed throughout the eight-week curricula. As a result of their participation in the training, some service organizations requested that the Leadership Institute be expanded to allow their staff or volunteers to attend. Several organizations who have been recipients of Institute graduates have commented that the graduates of the Leadership Institute are better prepared to serve, and receive more intensive training regarding community resources and managerial skills than their professional paid staff. These comments reflect a gap in terms of service training and readiness by existing service organizations and presents new challenges and opportunities to develop expanded service models. A separate community capacity track or service readiness track would complement and strengthen the Institute model while simultaneously provide a valuable community service. This added component is under active consideration for further development.

VOLUNTEER INTERNSHIP

Internships are most often thought of as continuous learning opportunities for students completing an undergraduate or graduate program. The obvious intent is to provide the student a structured learning environment that allows them to actively apply their accumulated years of learning. Volunteerism should be no different. Providing the Leadership Institute students an active service learning internship is key to retention and high quality service. It also elevates, adds value and professionalizes the volunteer experience, which are important points in attracting the baby boomer volunteer. After eight weeks of classroom instruction, students become actively involved in community

service by completing a four-week internship program at a pre-approved community organization. Approved service organizations must designate a direct supervisor or coach, have pre-approved position descriptions, actively engage volunteers in the decision making structure of the agency, provide a variety of service learning opportunities and provide volunteers the same opportunities for agency participation as that of paid staff. Students throughout their coursework are asked to consider where they want to serve in the community. A transitions coach is assigned to work with each student to help them determine their individual interests and then match those interests and skills with a local service organization. The coach follows them through their internship to assess the appropriateness of the match and to facilitate the communication process between the agency and the volunteer/student. Service opportunities can be categorized in three major areas:

- **Community-based services:** those organizations providing direct service opportunities such as respite care and adult day care;
- **Career Transitions:** those individuals seeking a seamless transition from work to community service and those wanting to reengage in the work force on a part-time basis may engage in activities such as volunteer generation, marketing and community organizing; and
- **Mentoring:** those wanting to participate in inter-generational activities. Students are asked to commit to providing between 15-20 hours of volunteer service each week. Throughout the internship, students participate in reflective sessions that provide a forum for information sharing and peer collaborative problem solving.

GRADUATION

A graduation ceremony culminates the 12-week program. Family members, host organizations, the media, institutions of higher

learning and invited national, state and local representatives attend the graduation ceremony. Students vote to determine who will speak on behalf of the class at the graduation ceremony. Students who entered the program with little knowledge about community resources and civic engagement opportunities are now ready for service opportunities to meet community needs. Many students continue to serve in their internship sites while others develop new service activities. All are encouraged, beginning with their acceptance into the program, to make a sustained service commitment after graduation.

OUTCOMES

What does this model teach us about attracting and retaining a new younger generation of retirees? The answer to this question is best understood by asking three other questions? (1) Does a volunteer leadership model expand community capacity to meet identified needs? (2) Does combining life-long learning and civic engagement attract and retain experienced older persons? (3) Is this model replicable?

Does a volunteer leadership model expand community capacity to meet identified needs? Through student exit interviews and program evaluation, we have learned that the word "leadership" evokes feelings of self-worth, transference of skills and the opportunity to shape the environment. This aspect of the model, as reported by the students was an integral factor in attracting and recruiting a high level professional volunteer. Students did not want to participate in the traditional roles often ascribed to volunteers such as answering the telephone, stuffing mailing envelopes or other menial low skill tasks. This requires organizations wanting to tap into a new younger generation of volunteers to rethink and reframe their approach to volunteers and to assess internal paradigms of operation. Volunteers graduating from the Leadership Institute are seeking to participate

in the life of an organization, have influence in the decisions that impact their responsibilities, be recognized as resources within the organization, be given the same respect and opportunities as other paid employees and perform in a way that the impact of their work is measurable.

The first four classes of the Leadership Institute for Active Aging graduated 92 volunteers. Those 92 volunteers provided nearly 43,000 hours of service to over 7,200 individuals in the community. Over 24,000 hours of service have been provided in direct service activities such as respite care, companionship, medical insurance assistance, and literacy tutoring. Approximately 19,000 hours of indirect service have been rendered, including community organizing activities, crime prevention, marketing, public speaking and intervention and prevention services. The overall financial contribution to the community is valued at \$660,661, based on the Independent Sector estimate of \$15.39 for the hourly rate or value of volunteer time (Independent Sector, 2002). Current projections are that by the end of the fifth year, 172,560 hours of service will be rendered in the community at an estimated value of over \$2,500,000. Future initiatives include a specific focus on volunteer generation training to further increase the number of volunteers and service hours performed, thus increasing the impact in the community.

Agencies recruited as placement sites for Leadership Institute graduates have expressed high satisfaction with the quality, commitment, and capacities of these volunteers. During the first three years of operation, regular meetings were held with placement agencies in order to obtain continuous quality assurance feedback about how best to make the Institute work for them. In a written survey and an in-depth telephone interview with a sample of 15 agencies, 85 percent were satisfied or very satisfied with their connection with the Institute. Agencies report that Institute volunteers have assisted them in increasing services, developing

new and needed services, and increasing public awareness regarding services rendered.

The Institute graduates were interviewed by telephone twice for their response to the training and volunteering they have experienced. In keeping with the goal to expand community capacity, approximately 70 percent of the graduates of the first four classes went on to volunteer in community agencies after their internship. Those that did not go on were often deterred by personal illness or the illness of a family member. The average number of post graduation volunteer hours per month reported by Institute graduates was 47.

Does combining life-long learning and civic engagement attract and retain experienced older persons? The leadership model demonstrates that meaningful life-long learning opportunities are a strong factor in attracting and retaining younger retirees. Participants indicate the primary motive for attending the Institute was the opportunity to reconnect with others in a structured learning environment and to apply their paid job experiences to positively impact their community. The issue of volunteer community service was an extension of this learning experience but was not the initial primary motivation. Exit interviews revealed that if participants had only been told about community service opportunities and the need for volunteers, most of them would not have been interested. The integration of a continuous life-long learning component that extends beyond the Leadership Institute has broad appeal to younger retirees and the baby boomer generation. Baby boomers, who represent the next generation of volunteers, are better educated than previous generations of volunteers and display a strong interest in education. In a study by Peter D. Hart Research Associates, 37 percent of older adults report that continuing their education is very important to them (Gardyn, American Demographics, November 2000). Once

enrolled, the opportunities for community service and civic engagement were presented in an educational format. Students clearly stated that if the initial advertisement had focused solely on recruiting volunteers they would not have responded. To further validate the strength of the life-long learning connection, students were asked if the eight-week curriculum was too long. Their response was a resounding “no” with most reporting it could have been longer. The transference of the life-long learning concept to volunteer programs will be essential in the future. It will not be enough to provide a one-time educational experience. Programs must find ways to integrate educational curricula throughout the life of the volunteer experience as an incentive for retention.

In a survey of the graduates, respondents were asked about their training.

- Forty-eight percent of respondents mentioned that the speakers or lectures were the best part of the training.
- Twenty-two percent reported that learning about aging issues and resources in the community was the most useful part.
- Twenty-two percent reported that meeting new people and networking was important to them.

The majority of respondents said that the training adequately prepared them for the volunteer placement. When asked how the training could be improved, 24 percent of volunteers did not think that any aspect of the training needed to be improved. Site visits to community organizations providing support services to frail elders are interspersed with the classroom experience. Volunteers were most likely to suggest having more field trips as a way to enhance training. Institute graduates are clear that volunteer organizations seeking to recruit them will need to create meaningful and challenging volunteer experiences. A redefinition and reframing of volunteerism that affords prospective volunteers opportunities to be engaged in meaningful civic and service activities similar to that

of other paid professional staff needs to emerge in order to attract and retain a strong volunteer force.

Is this model replicable? The life-long learning and civic engagement model has broad organizational and community application. The strength of this model is its flexibility and adaptability. The two concepts of life-long learning and civic engagement are the building blocks for attracting and retaining a new generation of volunteers. This model offers organizations the opportunity to reframe their message, rethink their programs and services matrix and create a marketing niche.

The organizational management and costs of implementing this model are flexible and responsive to individual organizational cultures. The Institute was developed with initial funding from the Corporation for National Service. A project director was financed through this method. The majority of the funds were set aside to pay a monthly cost reimbursement to each volunteer. Similar programs have been developed with a slightly lower volunteer time commitment per month that does not include cost reimbursement. For example, volunteers participating in Senior Leadership Maryland, a program that embodies the life-long learning model and places seniors with elected legislative officials for 10-12 hours a week, receive no momentary compensation. These programs have also been successful in recruiting experienced, motivated volunteers.

There was no cost for trainers and speakers, as many were community agency people or local college faculty who donated their time. Once the curriculum and program are developed, the greatest resource expenditure is on recruiting and working with both participants and agency placement sites. The Leadership Institute model could replace or enhance existing recruitment and retention activities with a volunteer coordinator assisted by a team of program graduates to achieve program cost containment once the program was in place.

CONCLUSION

The concept of combining life-long learning with civic engagement to attract and retain baby boomers is the gateway to innovative and successful volunteer programs. Baby boomer volunteers will be attracted to and will commit to sustained service that provides meaningful service learning roles coupled with continuous educational opportunities. Community capacity will be expanded to meet identified needs in a manner that maximizes scarce resources. The leadership Institute offers a framework and tools to leverage the resources of the younger retirees and baby boom generation to meet and expand community capacity. As a starting point, organizations replicating this model will need to rethink and reframe their volunteer and service opportunities message. Who are you trying to reach? What incentives are needed? What are the available community resources? How will you sustain the program? Who will be the community collaborative partners? Once you have answered these questions, you are ready to invite other community partners to join you in thinking strategically about your community and its needs. Including ideas generated by community partners brings potential resources needed to sustain your program. One lesson learned in the development of this model was not to rush the planning and development phase. Organizations should allow at least six to eight months to complete the planning and development phase. It will be time well spent and ensures the essential buy-in from community partners. A network of community partners can provide strong operational support. We also learned the importance of simultaneously developing a capacity building track for prospective community host agencies. Organizations in the community may not be prepared to receive or provide adequate support for this type of high level volunteer. Educating host agencies about the goals and objectives of the program and involving them in the operational aspects of the Institute will

reduce the frustration and barriers (e.g., paid staff feeling threatened by caliber of the volunteer who they may perceive as taking over their job; asking graduates to answer the telephone and make copies rather than engage them in meaningful roles) encountered by some earlier Institute graduates.

The future generation of age 50+ volunteers will expect and demand more from their volunteer experience. They expect to be a part of the decision making process, they want flexibility that allows them to integrate paid and unpaid work, they want to engage in meaningful service learning activities, be afforded opportunities similar to those offered to paid staff and be able to transfer their professional skills to positively impact local community needs. Successful organizations seeking to harness the vast, yet untapped resources of age 50+ volunteers will need to reassess and think expansively and creatively about needs and service opportunities, strategically engage other community collaborative partners, and employ market driven strategies and incentives to attract and retain baby boomers and younger retirees as volunteers.

REFERENCES

- Keefe, S. (2001). *Tapping Senior Power — Community Partnerships That Work*. Private Consultant, Corporation for National Service Cluster Conference.
- Federal Intragency Forum on Aging-Relation Statistics. (2000), *Older Americans 2000: Key Indicators of Well-Being*, Washington, D.C.
- Gardyn, Rebecca (2000). Retirement Redefined, *American Demographics*, November 2000
- Independent Sector. (2000), *Value of Volunteer Time*, Washington, DC
- Tanz, J., and Spencer, T. (2000). Candy Striper, My Ass! *Fortune Magazine*, August 14, 2000.