

# Minnesota Summit on the Future Role of Senior Volunteers: A Planning and Recruitment Concept

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## INTRODUCTION

Will the same approaches to recruiting, placing and retaining volunteers over the age of fifty currently in practice be effective for future generations? Well established organizations with significant experience in senior volunteerism already are noting increased challenges in successfully recruiting volunteers from this target population. Social, economic and technological trends are shaping the choices and values of baby boomers and near boomers. Many competing opportunities for work, leisure, and life-long learning are influencing the circumstances under which they may choose to volunteer in the future. Local community agencies are becoming increasingly aware that the volunteers of the future might have very different backgrounds, motivations and interests in volunteering. Opportunities that attracted volunteers in the past might not provide the same motivation for potential volunteers to serve in the future.

One organization in the State of Minnesota made the commitment to assess the future of senior service and volunteerism in the State of Minnesota. Lutheran Services in America and Lutheran Social Services of Minnesota conducted a Summit in Brainerd, Minnesota in November 2000. The convenors of the Minnesota Summit sought help to ascertain why it was becoming increasingly difficult to recruit and keep older volunteers and to rec-

ommend how volunteer programs could change to make volunteerism more attractive for future retirees. Invited to think strategically were those deemed most likely to have valuable insight: a diverse and previously unaffiliated group of 35 Minnesotans over the age of 50, along with representatives of state and local volunteer organizations. The format of this Summit, the use of a Future Search that facilitated collaborative thinking and shared vision among participants, and the Summit's findings create a model that could be used by other states.

## METHODS

The Minnesota Summit emerged from a national demonstration, Experience Corps for Independent Living, funded from 1998-2001 by the federal government volunteer agency, the Corporation for National and Community Service. Implemented in collaboration with AARP in six sites (Arizona, California, Maryland, Minnesota, Utah and Florida), the demonstration tested new ways to attract older volunteers to help the frail elderly remain in the community through the use of independent living services. The Minnesota site was the only rural demonstration site, and the only one to implement the project in four agencies throughout the state rather than one agency. Several concepts were tested: (a) lowering the eligibility age for senior vol-

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unteer participation from 60 to 55, (b) replacing the income eligibility criteria that exist in other federal senior volunteer programs with a monthly cost reimbursement incentive, (c) asking for a commitment of 15-20 hours per week in order to receive the reimbursement, (d) assigning a large percentage of volunteer hours to indirect service activities (volunteer management and recruitment) rather than direct service activities (chore services, friendly visiting, and transportation assistance). Experience in Minnesota in recruiting served as the basis for deciding to collect more information on recruiting from potential volunteers through a summit.

The staff from Lutheran Social Services of Minnesota began planning six months before the Summit. Steps taken included: (a) designing an invitation letter to describe purpose, goals and objectives and expectations for participants, (b) asking volunteer agencies statewide to identify possible participants who were not already volunteering in their agencies, were recent retirees, and came from a variety of professional and occupational backgrounds, (c) sending letters to those identified inviting them to apply to attend the Summit, and (d) informing applicants of their acceptance.

A total of 35 participants were chosen to attend the Summit including retirees from corporations (10), health-related fields (2), teaching (7), social service or non-profit agencies (6), self-employment or small businesses (3), government (2), restaurants (2), other full or part-time situations (2) and student status (1). Among the thirty-five participants, nine married couples chose to attend together. In addition, five staff members from Lutheran Social Services of Minnesota and single representatives from Lutheran Services in America, the Minnesota Board on Aging, and the state office of the Corporation for National and Community Service participated.

The Summit was developed and facilitated

by staff from the University of Maryland's Center on Aging, the technical assistance provider to Experience Corps for Independent Living. As experienced specialists in senior volunteerism, they used the Future Search approach developed by Marvin Weisbrod (1999). The Future Search method was developed, tested, and documented as a consensus planning approach among people with diverse interests. The goal of Future Search is to gain consensus on a desired future and create action plans to realize it. The approach allows for an exploration of common ground based on the ability to learn from experience. Prior to beginning the Future Search, participants had the opportunity to hear current facts and demographics regarding productive aging, employment and volunteerism in Minnesota. The Future Search was based on five tasks that were accomplished through both individual and group participation and assessment.

Task 1: Establish the history of the issues being addressed through the context of both individual and society.

Task 2: Review current trends that affect the issue.

Task 3: Identify the critical aspects necessary to solve the problem.

Task 4: Review all that has been shared in Tasks 1, 2 and 3 and create ideal future scenarios that will address solutions.

Task 5: Look for common themes among the scenarios and develop plans of action and individual commitment to actually address the issues.

## FINDINGS

### **Task 1: Focus on the Past: An Historical Perspective on Volunteerism at both the Individual and Society Levels**

Respondents were asked to think back across the past four decades about key events and turning points on both the personal and social levels. Participants provided a comprehensive historical perspective by recording their thoughts on a wall chart marked by four

decades. Small groups reviewed the wall charts and defined general themes for their personal histories and societal events. They identified family as a central theme in their personal histories as well as military participation, marriage, careers, divorce, children, grandchildren, travel and leisure, and retirement. They named globalization as being very influential over the decades as well as the impact of war, the post-war baby boom, the GI Bill, the technology boom, culture and value shifts, the growing economic disparity between the wealthy and poor, civil rights, the changing roles of women, women and work, and shifts in attitudes.

### **Task 2: Focus on the Present**

Summit participants were divided into small groups and asked to perform two mapping tasks: (1) to identify the critical issues and trends that impact current senior service, and (2) to discuss current responses and a desired future response that would enhance senior service participation in Minnesota. The five groups identified five different issues as critical in impacting senior service.

*1. Matching volunteer interests and preferences with a suitable assignment.* Currently volunteer coordinators do not always interview volunteers in order to determine the volunteer's capacities and interests. The volunteer coordinator may be more interested in filling needs or slots than matching interests. In essence, potential volunteers are not asked about their interests but rather are told about narrowly defined program needs. This focus does not allow for creative matching of skills and talents of each volunteer to agency needs. In the future, volunteer coordinators should interview volunteers to ascertain and match their skills and interests with agencies needs. Coordinators could function as outplacement connectors and refer each volunteer to another agency when a volunteer's interests change during placement or when a match did not exist. Coordinators could use the Internet to enhance the match between volunteers and opportunities.

*2. Standardization of the role of volunteerism in agencies.* Currently, many agencies are limited in terms of how they view the volunteer and the volunteer coordinator. The role of volunteers is too rigidly defined, and flexibility is lacking regarding the use of volunteers within the organization. Agencies do not adequately value the role of the volunteer. In the future, the role of the volunteer coordinator should be elevated and integrated into the management structure. The volunteer coordinator should be trained on how to most effectively train volunteers. Agencies need to adequately recognize the real resource value of volunteers when making decisions regarding resource needs and allocations.

*3. Volunteers do not feel their contributions are important.* Currently, volunteers do not always feel their contributions are valued. A poor match of a volunteer with the setting, or failure to move a volunteer to a more appropriate placement make mutual appreciation difficult. Volunteer coordinators may not have the necessary training and skills to correct this situation. In the future, agencies should: (a) encourage well trained and dedicated volunteer coordinators and recognize the critical importance of this position at the managerial level; (b) assure that training and continuing education for coordinators undergo continuous quality improvement; and (c) train coordinators on how to provide recognition, matching volunteer interests with positions, assessing how valued volunteers feel, and seek feedback when volunteers do not feel valued.

*4. Enhance the Flexibility and Mobility of Volunteer Opportunities.* Currently, opportunities are often too constricted and not responsive to the lifestyle of today's retirees. Current agency structure does not adequately address the types of schedules for different volunteer opportunities, reimbursements for volunteer costs, and shared decision making on issues relevant to the volunteer. In the future, choice is a very important concept for the volunteer of today and tomorrow. Volunteers should be given a variety of options concerning schedules, types of work, and length of

service and reimbursement of costs regardless of income.

### 5. *Expansion of the Volunteer Pool in a Strong Labor Market.*

Currently, several national agencies are clear that significant attention needs to be paid to finding ways to continue to increase the rate of senior participation in service activities. Due to a strong economy and fewer young people available to fill positions, people over age 50 are either staying at work, returning to work, or being lured into part-time positions. The rate of volunteer participation may be affected. Programs that the Corporation for National and Community Service has created through demonstration projects are indicators of the kind of response needed. In the future, it is necessary to offer a variety of benefit options as well as adequate and meaningful rewards of a non-financial nature in order to compete with the labor market. It is important to have the capacity to cast the widest net possible to attract volunteers. This means not limiting appeals for volunteers to certain segments of the populations, or being too restrictive in terms of length of commitment, hours worked per week, income eligibility, methods and locations where volunteers are sought, and how and to whom cost reimbursement is distributed.

**Task 3: Focus on the Future.** Summit participants were divided into small groups and asked to present creative scenarios on: (a) critical issues and responses that had been developed and discussed regarding future recruitment of senior volunteers, and (b) the ideal future for senior volunteerism in the State of Minnesota. Creative scenarios on five major areas were presented through a talk show, dramatization, a song written for the event, and various skits.

1. *Incentives:* Creative thinking about the kind of incentives which might attract senior volunteers included: (a) offering gift certificates or discounts for such personal perks as massage, classes, or books; (b) lobbying the

state legislature for a \$1000 tax credit associated with a volunteer commitment; (c) organizing free or discounted trips for the volunteers; (d) paying the supplemental Medicare insurance premium; (d) offering frequent flyer mile affiliation so that hours worked would translate into frequent flyer miles; (e) offering transportation to and from volunteer activities; and (f) offering vouchers for participation in continuing education and computer classes.

2. *Volunteer opportunities with a social perspective:* Some scenarios emphasized that the volunteer of the future would highly value social and interpersonal aspects of a group activity and virtual interaction with fellow volunteers.

3. *Transportation:* Scenarios suggested several innovative ways to meet transportation needs of volunteers in the future including: (a) using school buses during off hours, (b) working with the legislature to apply a portion of tax dollars to funding drivers, and (c) working with local corporations in a manner similar to meals on wheels whereby work release time is permitted to drivers to meet transportation needs.

4. *Recruitment:* Scenario building to improve recruitment recommended:

1. Use the Internet as a way to match volunteer profiles and volunteer opportunities not just locally, but nationally and internationally.
2. Establish central places such as the local library where recruitment and volunteer opportunities could be accomplished through computer access or other means.
3. Develop more intergenerational and family volunteer opportunities.
4. Create one-stop shopping for recruitment so that a volunteer will know where to look for opportunity and organizations can determine the best match.

5. *Time commitment:* Participants emphasized that retirees of today and in the future have many options, and want to pursue life-long learning, recreation, leisure, travel, and family engagement. Therefore, many varia-

tions in time commitment and flexibility are important so that a volunteer can take time out for travel and family activities without fear of disappointing the agency.

#### **Task 4: Focus on Action by Identifying Conditions to Increase Senior Service.**

Participants were divided into small groups to review the themes and concepts presented in the scenarios. They reported on the conditions that must be created in order to translate these ideal futures into reality.

*1. Offer opportunities for everyone to volunteer through an all inclusive approach:* (a) create opportunities based on community need that appeal to all types of people; (b) compile a list of identified needs of the community; (c) establish who are the intended clients, and compile lists of volunteers at various skill levels who can meet these needs; (d) develop assignment profiles and then educate client, staff, and volunteers about expectations and performance regarding these assignments; (e) evaluate on an ongoing basis to assure inclusiveness as well as needs being met; (f) include opportunities for the able and disabled, multi-cultural and multi-lingual, singles and couples, intergenerations, and flexible hours and term of involvement.

*2. Providing perks, recognition, rewards, and incentives to attract volunteers:* (a) ask volunteers in each agency to assess what is meaningful, necessary, and feasible for them; (b) include stakeholders, funders and others in brainstorming creative and effective incentives which will attract and retain volunteers; (c) develop and maintain personal relationships with volunteers through financial assistance, creative incentives, and recognition; (d) promote the value of volunteerism, and the associated rewards and incentives through national leadership particularly for incentives such as health insurance coverage and tax credits.

*3. Conduct recruitment and outreach/volunteer driven opportunities:* (a) poll volunteers or a pool of potential volunteers to ascertain how they get information and use these methods

to advertise volunteer opportunities; (b) use church bulletins, corporate newsletters, local media, and local papers; (c) work with corporations to establish a pre-retirement link in order to interest employees in future volunteering or part time work opportunities supported by an employer; (d) create profiles of volunteers and accessible opportunities through the Internet, store front centers, or newspaper job listings; and (e) give volunteers control by asking them rather than agencies to call others about opportunities.

#### **Task 5: Specific Questions Currently Affecting Senior Volunteerism.**

Stakeholders attending the Summit asked participants to address four questions.

*1. What do volunteers over the age of 50 want to be called?* Most of the group did not want the word senior to be used as a part of volunteerism. They felt strongly that the word senior was limiting because they were interested in family and intergenerational volunteerism. They felt that the word volunteer should be inclusive and that adding senior implied an exclusivity that left others out. Alternative names suggested for senior volunteerism included community connectors, caregivers, unpaid staff, unpaid volunteer staff, and service leaders.

*2. What kind of incentives do volunteers want?* The feeling of making a difference was the incentive that was most likely to keep Summit participants volunteering. They wanted assurance that their program had a real presence in the community, and that the media recognized volunteers. They also named liability coverage, health insurance assistance, free long distance telephone calls, reduction in life insurance or property taxes based on contributing a specific number of volunteer hours, and transportation assistance. Many were interested in educational awards that could be directed to a grandchild or needy student or awards earned by working together with a grandchild.

*3. How can more people like you be recruited to volunteer?* Recommendations were: (a) focus recruitment on needs that are out there;

(b) educate the public about these needs and what role individuals can play in meeting them; (c) capture the interest of potential volunteers before they retire; (d) find a regular and viable means to make a connection during the window of opportunity — six months before and up to six months after retirement; (e) work with corporations to smooth these transitions through an out placement format to recruit new volunteers; (f) encourage corporations to build volunteering into the work week of the pre-retirees to enhance long term commitment to volunteerism; and (g) match skills and strengths to flexible volunteer options.

4. *What volunteer arrangements would attract you?* Responses were: (a) participate with family, spouses and other generations; (b) connect with groups that create social networks and share the load; (c) pair volunteerism with another activity such as lifelong learning, recreation, travel, international travel and volunteer exchanges, and service corps; (d) apply skills to community needs.

## RECOMMENDATIONS

The Minnesota Summit on the Future Role of Senior Volunteers provided stakeholders, and a sample of persons over age 50, with an opportunity to share ideas, and to generate new thinking about ideal formats for volunteerism in the future. Several themes and priorities emerged as a result of the Future Search process:

1. Offer choice, flexibility, and matching by being responsive to the way we have come to live our lives, by providing numerous options — the ability to choose what and how much volunteers do, and a strong method for matching agency need with potential volunteer talent. Be all inclusive by not limiting volunteer opportunities to one group such as seniors, offering the capacity to volunteer with family, friends, or persons with similar skills, and promoting volunteer opportunities and incentives regardless of age or income.

3. Watch recruitment timing by informing employees prior to retirement about volunteer opportunities so that they can include service in retirement planning.
4. Form corporate partnerships by encouraging corporations to offer employees release time for volunteering before retirement, sponsor information sessions on volunteering as a part of pre-retirement planning, and provide hybrid job opportunities for workers transitioning to retirement that include reduction in job time accompanied by increases in community service time over a specified period.
5. Centralize information and referral by using the Internet, and statewide and national linkages that assure that opportunities are accessible and available to potential volunteers and placement agencies.
6. Enhancing volunteerism by pairing volunteer activity with educational and recreational opportunities, lifelong learning, domestic and international travel, family and intergenerational relationships, and volunteer service and learning that could lead to new employment options.
7. Conducting additional Summits by targeting various subgroups of baby boomers to solicit their input about future service, and using that information to enhance the image and potential of volunteer service.

## IMPLICATIONS

The Minnesota Summit on the Future Role of Senior Volunteers provided an opportunity to do strategic thinking with both volunteer agencies and potential volunteers. The format provided for an intensive period of time to focus exclusively on the issue of how to get a significant number of older Minnesotans to volunteer in their communities in the next several decades. The results not only provided a framework for action by volunteer agencies but also created a new model for recruitment. Participants indicated that similar local or state level summits might be an effective method to attract individuals to vol-

unteer. Replicating the summit concept is one step toward the essential process of enlisting a new generation of skilled volunteers to respond to community need. By asking them directly about the best ways to get them involved, the likelihood of successful recruitment in the future increases.

The findings of the Summit build upon current literature associated with concerns about the reduction in social capital production in the United States, the uniqueness of marketing to baby boomers, and an understanding about how differently baby boomers will impact the concept of retirement. In looking into changes in social behavior surrounding civic responsibility in the past few decades, Robert Putnam (1999) notes that while volunteerism has increased in the past several decades, that increase is concentrated in people over the age of sixty (p.129). Baby boomers are actually volunteering 29 percent less than people that age in 1975. Putnam indicates that the boomer cohort is less disposed to civic engagement (p.133), giving a factual basis to the need defined in the Summit to adequately prepare for recruiting boomers rather than assuming the same methods would work that had been successful previously. This need to recognize the individuality of the boomers is echoed by Smith and Clurman (1977) in their book on generational marketing. They indicate that to a large degree, one's generation defines who you are. Boomers, they state, are rule breakers, believe they should have control and are demanding customers. These characteristics have implications for recruitment and retention of boomers as volunteers. Finally, Freedman (1999), writing about boomers and retirement, indicates that boomers report seeing volunteerism as an important part of their later life. He warns, however, that we need a compelling vision to accomplish successful engagement of this population. Volunteer administrators can combine these findings with the recommendations emerging from the Minnesota Summit to help plan effectively for the next generation of volunteers.

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