



**RespectAbility in America:
Guiding Principles for Civic Engagement among Adults 55+**

By

Thomas Endres, V.P. Civic Contribution
National Council on Aging and
Carolyn A. Holmes, M.Sc.N., Ph.D.
Holmes Research & Consulting, LLC

Adults 55 years of age and older (Adults 55+) are the country's fastest growing and most significant human resource for creating the futures we envision to keep our communities vital. Vital communities embrace intergenerational solutions to human needs and are proactive in creating a community that supports positive aging in place. Beginning in 2005, the *RespectAbility*¹ Initiative at the National Council on Aging (NCOA) issued a national call to identify the most promising practices² in civic engagement³ among adults 55+. In-depth research of civic engagement initiatives⁴ yielded rich insights into effective strategies for tapping older adults as a 21st century national resource to help solve critical community needs.

Promising Practices were collected from 34 civic engagement initiatives, selected from 247 applicants demonstrating tangible results in local communities. The guiding principles summarized are published in the monograph entitled, *RespectAbility in America: Promising Practices in Civic Engagement among Adults 55+*. Available mid-2006, the research results will help set a new direction for the field of civic engagement among adults 55+ (See www.respectability.org).

¹ *RespectAbility* is a three year initiative generously supported by The Atlantic Philanthropies.

² We are using the word "promising" rather than "best" because there is a lack of definition, documentation, and consensus about recent developments and innovations in the field of civic engagement that focus on adults 55 years of age and older.

³ We define civic engagement as creating opportunities for adults 55+ to renew their communities. We use the term "civic engagement" rather than "volunteerism" to reflect developments in the field with regard to 1) changing societal structure (incorporating adults 55+ as the next generation of adults in paid and unpaid service positions); 2) the increasing diversity of opportunities for adult contribution; and 3) the broader range of opportunities from completely unpaid service to service for stipends, to alternative compensation (e.g., health benefits, transportation reimbursement), and to part-time and full-time work.

The *RespectAbility* Promising Practices research clearly demonstrates that the locus of innovation in civic engagement activities that meet critical human needs and solve serious problems resides within local communities. Nonprofit organizations in those communities become the impetus for change because they are on the front lines providing critical social services to large numbers of people, often with limited resources. Thus, nonprofits stand to reap the greatest benefit from effectively utilizing engaged adults 55+ in fulfilling their missions.

Societal Shifts Demand Transformation of Civic Engagement among Adults 55+

Three demographic and societal shifts are forcing a transformation in thinking that is fundamental for policy re-formulation and infrastructure development among nonprofits that must respond to these shifts in order to survive.

Burgeoning numbers of aging Americans are demanding more services, more opportunities and new outlets for their passions. The demographic revolution of the 78 million aging baby boomers is unprecedented in America. The first Boomers turned 60 in January 2006, and another 7,918 are turning 60 every day.⁵

Increasing longevity creates a new developmental stage in the aging process, spawning a re-definition of life purpose. Society must help adults 55+ re-define the 20-30 bonus years of healthy, productive living after the traditional retirement age of 65. This can be a time to focus on personal and civic renewal, through opportunities for satisfying mental, physical, emotional and spiritual evolution.

Volunteer, workforce and workplace policies and practices at the national, state, and local levels are antiquated and inadequate. Institutional and organizational structures and attitudes need to shift away from a “retirement” mentality to an “engagement” mentality. Policy changes supported by adequate resources are needed to strengthen the nonprofit sector’s ability to tap older adults as a vital resource in increasing their service capacity.

Nonprofit leaders cannot deny the potential of a burgeoning group of adults who want to make civic contributions in their later years. These leaders lack experience in engaging this potential resource in meaningful ways and are not yet convinced that directing scarce resources toward this end will greatly benefit their organizations. The impact of this paradoxical impasse is two fold. A badly needed, cost-effective human resource pool remains undeveloped and unutilized in ways that could strengthen the nonprofit sector while nonprofit leaders face increased competition for scarce dollars because of trends toward reduced funding in federal social service and discretionary programs.

⁵ US Census Bureau, January 3, 2006. http://www.census.gov/Press-Release/www/releases/archives/facts_for_features_special_editions/006105.html

Reframing Civic Engagement among Adults 55+ Provides a Fresh Set of Guiding Principles for the Field

Cognitive research demonstrates that people perceive and interpret political positions or issues based on deeply held preconceptions or "frames" that are impervious to new information that contradicts the person's existing views.⁶ In The Civic Renewal Movement, Sirianni and Friedland⁷ assert that, "Developing a civic renewal frame is one way that movement thinkers and leaders have begun to connect the dots" across domains of different work and ideological orientations. The in-depth review of 34 organizations allowed us to "connect the dots" and to formulate a set of 10 Guiding Principles for the future development of the civic engagement field.

This paper is prepared for nonprofit leaders who want to capitalize on the resources of the expanding pool of adults 55+ as a means to improve delivery of service, enhance programmatic effectiveness, and strengthen organizational capacity. In presenting the guiding principles that emerged from the *RespectAbility* research, we first describe traditional practices in the field and contrast that with a reframing of issues, principles, and practices discovered among the award winning programs in civic engagement and adults 55+.

Principle 1. Integration and Alignment of Participant and Organizational Interests

Traditional Practices. The history of public voluntary service is replete with arguments about whether the primary benefactor is the participant or the organization and its mission. When participant interests are paramount, decisions about what gets done reflect deference to the participant interests, needs, and desires. On the other hand, when the organization is the central driver, programming concepts and decision-making defaults to whatever it takes to get the job done or to produce the desired outcome. To be truly effective in either direction, program developers need to choose the starting purpose and end result of their design and structure.

Emerging Paradigm. Organizational leaders from the Promising Practice finalists and semi-finalist organizations have come to rely on adults 55+ as a resource that can expand their organizational capacity and improve their ability to reach their service goals. They are successfully meeting the challenge of satisfying the self-interests of coming generations of retirees and simultaneously addressing the organizational critical needs and priorities. What we see from the Promising Practices are that the interests and characteristics of the future retirees are aligned with the interests and needs of nonprofit organization.

Promising Pathways. Nonprofit leaders realize that for engaged adults to be instrumental in meeting organizational goals they must be fully integrated into the fabric of the organization. Trained older adults become "counterparts" with staff members, assisting with fundraisers, improving administrative and management systems,

⁶ Susan Bales, president of the nonprofit FrameWorks Institute, cited on the Pew Charitable Trust Web Site

⁷ Carmen Sirianni & Lew Friedland, The Civic Renewal Movement, Kettering Foundation

contributing to strategic planning, and coordinating and managing programs. The Promising Practices awardees are demonstrating a new service paradigm where the volunteer's needs and values are aligned with and integrated into the priority issues and needs of the organization and the community it serves. An integrated approach based on inter-dependence is emerging and influencing program development and organizational management.

Principle 2. Valuing the Assets of Aging

Traditional Practices. Our society is fraught with negative stereotypes and messages of aging: anti-aging campaigns pressure us to deny our age, hide our aging bodies, smooth out our wrinkles, while stereotypical beliefs perpetrate a bleak future of decline and death. Similarly, organizations encourage the predictions of the “aging workforce” by attaching retirement to an age, without taking into account the changing nature of work contributed and in the work force. They believe the myth of a leisurely retirement is pervasive and older adults are not willing to commit to work. Highly experienced retired adults, not ready to hang up their hats, seeking new opportunities for high level work face choices among mundane role and activities and are often met with resistance

Emerging Paradigm. Promising organizations in civic engagement are successfully mobilizing the new wave of adults 55+ as an army of social entrepreneurs and activists whose purpose is to strengthen the organization, community and civil society. They are employing new principles for turning the “baby boom” into the “resource boom” that are based on mutual exchange and benefit and alignment of participant interests with organizational priorities. They are discarding notions of traditional volunteering and replacing them with open-minded approaches to what gets done and how.

Promising Pathways. Organizations that are successfully tapping into the resource potential of adults 55+ are reframing the meaning and purpose of work and career; developing a flexible array of opportunities that encourage teamwork and collegiality, providing opportunities for personal development and growth; and developing a culture that fosters communication, collaboration, and continuous interaction. The asset potential of aging is recognized and becomes central to developing the organization's capacity to utilize this resource in fulfilling their mission.

Principle 3. Building Intentional Relationships

Traditional Practices. Volunteer service leaders know that constant interactions between volunteer and client are necessary for a helping relationship to succeed. Traditional program approaches address this need by structuring the volunteer-client contact, often limiting contact for each volunteer to a few ongoing clients in one-on-one relationships. Another customary approach is to specify service schedules in hours per week or number of interactions over time needed to fulfill the volunteer commitment. These mechanisms, while necessary in certain types of programs such as mentoring, are rigid and require large amounts of administration. Additionally, they tend to appeal to participants who are seeking highly structured experiences. RespectAbility research has shown that the

rigidity and intensity of this approach will not appeal to a large number of new 55+ participants. Likewise, the infrastructure needed to support this type of assignment is too costly, slow, and cumbersome to develop and monitor the number of service opportunities that will be necessary to engage millions of adults 55+.

Emerging Paradigms. The Promising Practice organizations carefully attend to the issue by placing emphasis on co-development by partnering with participants and by building strong, sustained relationships; achieving positive and productive communications; and nurturing trust as a core foundation of all relationships. Their refrain: “Don’t leave it to chance!” makes communications and group development training throughout the service experience essential. The new paradigm aims at teaching strong, commonly held communication abilities that foster connection, interdependence, inclusiveness, and common expectations for participation. Training takes many forms, such as following professionally developed curricula to practice in peer group settings and peer mentoring.

Promising Pathways. One of the permeating strands of the Promising Practice winners was “intentionality” about relationship formation. Attention to and clarity about forming “exchange relationships” helps to overcome skepticism and cynicism and strengthens the commitment of participants. Setting relationship formation at the top of the program agenda enables participants to work hand-in-hand with professional staff on the service team. Engaging participants with the full range of talents and experience they bring in the day-to-day operations, creates a “culture of connectedness.” Their influence adds significant value and contributes to achieving tangible results as well as enhancing their satisfaction and participation levels. Extended to partners and the community, strong relationships result in a community bond which leverages increased commitment and support.

Principle 4. Creating Empowered Participation

Traditional Practices. Nonprofit leaders traditionally consider volunteers a supplementary resource to assist with general administrative and support functions or to fill clearly defined roles for which they receive specific training. Over the past four decades the primary approach is to train volunteer managers in volunteer administration and management with dependency on the good will and nature of the volunteer. Almost exclusively, the trained managers were from supply side organizations such as Volunteer Centers and RSVP, programs that principally recruit and refer volunteers to service organizations throughout the community.

Emerging Paradigm. Aging Americans represent the best educated, experienced, and healthiest group this country has ever known. Promising organizations recognize that they must create practice standards that are consistent with the experiences and expectations of this 55+ cohort. Promising Practices acknowledge the personal and professional importance of engagement; professionalize the management by collaborative, not authoritarian, leaders; provide opportunities to influence the direction and implementation of projects and the organization; offer personal and professional development; encourage leadership engagement within the organization, and foster

collegiality and meaningful relationships. The emerging models are based on concepts of “Learning Organizations”⁸ and new leadership approaches as described in *Presence: Human Purpose and the Field of the Future*.⁹

Promising Pathways. Organizations successfully engaging adults 55+ see them as an experienced, talented capacity-building resource pool and as a cost-effective means to addressing important internal operating issues and performing critical roles in fulfilling their missions. Promising organizations purposefully include engaged adults, and give them a voice in the planning, development, and implementation of the work to be done. They are retooling their management systems and transforming their organizations, by attracting and addressing the interests and needs of adults 55+ in meaningful engagement integral to the organization.

Principle 5. Learning as a Pathway to Engagement

Traditional Practices. It has been long understood that volunteer service benefits the participant by providing them with training related to performing their assignments and learning through experience through completing tasks in the context of their volunteer work. In general, organizations view volunteer training as a necessary means to an end, but rarely attend to the deeper search for understanding, meaning, and purpose stimulated by advancing years.

Emerging Paradigm. Organizations successfully engaging adults 55+ understand they need to invest in continuing education and role-based training to enable participants to reinvest in themselves, the organization and its programs. Most have developed standardized approaches to increasing knowledge levels, advancing skills, offering leadership training and providing opportunities for reflection and sharing. Promising Practice organizations commit significant resources to the learning process and acknowledge that the desire to be challenged, to learn, and to grow are life-long pursuits.

Promising Pathways. Promising organizations invest in participants’ learning by creating opportunities to discover their personal and professional potential and to develop new, challenging and rewarding skills. They incorporate life-enhancing training, such as relationship-building skills, into the performance-specific training so personal growth happens within the larger context of helping the organization and its clients. They also make training a fundamental pre-requisite to participation. As people live healthier, longer lives, the issues of meaning, purpose, and connection become increasingly important. Responsive organizations seek to feed this hunger for redefining life as creative work through civic engagement and enhance the experience with learning opportunities.

Principle 6. Developing Capacity by Actualizing Leadership

⁸ Peter Senge, *The Fifth Discipline*

⁹ Senge, Scharmer, Jaworski, Flowers, *Presence: Human Purpose and the Field of the Future*

Traditional Practices. RespectAbility’s research to determine awareness and knowledge of demographic trends and their effect on national nonprofit organizations revealed that they are not building “aging” into their strategic plans or considering how it will impact their organization and services. Even though leaders are aware of changing demographics and believe that adults 55+ possess qualities with the potential to help their organizations succeed, nonprofit leaders are not making the investments necessary to turn this perception into reality. The most glaring gap is the lack of opportunities for older adults to assume leadership roles or responsibilities related to improving organizational performance or achieving their mission.

Emerging Paradigm. Promising organizations recognize that adults 55+ have the ability – and the desire – to work productively in paid and unpaid roles well beyond today’s “traditional” retirement age and that they expect service opportunities to reflect the professional environments and leadership roles from which they came. Adults 55+ bring a broad variety of skills developed through formal education, in-service training and life experience with them. Promising organizations build programs that cultivate the experience and skills of adults 55+ as a valuable resource to the organization. The most successful organizations have incorporated leadership training into their programs, identifying and developing participants with the interest, commitment, and skills to assume sustaining roles.

Promising Pathways. A number of Promising Practice finalists have developed models where participants are offered mentoring and peer support for transitioning into significant service roles such as community clinic-based physicians and organizational coaches. Participants attend leadership seminars, professional development peer groups, training sessions and other activities to prepare them to assume leadership roles. Some participants become so committed to the initiative that they become engaged in sustaining the program. Organizational leaders realize that, while requiring staff team work and oversight, volunteer leadership capability enables staff to work on organizational priorities and develop new programs and services which, in turn, attracts additional resources.

Principle 7. Embracing Cultural Competency

Traditional Practices. RespectAbility’s research about aging trends and their effects on nonprofit organizations demonstrated that, with the exception of age diversity, nonprofit organizations recognize the increasing cultural diversity of their communities. At the same time traditional volunteer organizations have and continue to struggle with diversifying their volunteer corps. When the use of stipends as a form of income transfer is removed from the equation, volunteer programs struggle to attract and involve more males, minorities, and professionals. Many volunteer programs struggle with the attitudinal and strategic changes needed to engage the underutilized groups. Attempts to address these issues have been slow to develop and largely unproductive, particularly related to minorities.

Emerging Paradigm. To successfully address and accelerate diversity in civic engagement, new thought and action is required beyond the numbers game. Successful organizations are making significant strides through the difficult work of building intercultural understanding and partnerships. Promising organizations are building “cultural competency,” to help understand and embrace differences and to develop responsible programming approaches that address barriers to engagement.

Promising Pathways. Several promising organizations are shifting from merely addressing diversity to implementing standards for cultural competence throughout their organizations. Several important distinctions became visible. Planning started with cultural self and community assessments to reveal strengths, weaknesses and growing edges. There was planned and intentional representation of groups across the community. Leadership positions were monitored to assure that vacancies were filled to retain representativeness. Inclusiveness was not forced but nurtured through active outreach and building authentic relationships. Standards of participation were created so that all viewpoints were heard and respected regardless of role, position, background, or socio-economic standing. Leadership was not vested in an individual but a representative group in which there was a balance of power. Training provided settings for building awareness, learning new behaviors, and changing attitudes.

Principle 8. Putting Meaning into Partnership

Traditional Practices. Partnership is an overused term and an underutilized organizing principle. In the old paradigm, Promising Practices research showed that powerful partners were often passive players in nonprofit-for profit partnerships. The power player might provide meeting rooms; contribute in-kind support or services for projects related to their mission; offer matching funds when staff participate; give free space for ads in their newsletters; or tag public service announcements on advertising when it benefited both parties. They were not, however, an active player in program operations.

Emerging Paradigm Organizations successfully engaging adults 55+ are creating partnerships as interdependent connections that provide a balance of exchange and power. The mutual exchange benefit between partners strengthens the relationship bonds, increases clarity of roles and expectations, smoothes the path for mutually satisfying solutions at times of stress, produces rapid progress toward goals, and leads to high satisfaction levels among partners.

Promising Pathways. Themes emerged from the research revealing balanced, interdependent partnerships that hold great promise. Partnerships require focused investment of time, thought and resources to mutually define the project’s purpose and strategy. Involvement of partners in all phases of project planning and implementation engendered stronger commitment to the project goals and outcomes; these, in turn, provided projects that were better aligned with each organization’s interests and needs. Joint accountability ensures each is responsible for achieving the project outcomes. Interdependence is underscored with accountability from all partners based on clearly stated expectations and recognition of mutual contributions to the cause and to each

other's future. Each partner brings assets to the table. Control is replaced by collaboration. Each partner is recognized for their contributions to each other and to the community they serve.

Principle 9. Producing Evidence and Accountability

Traditional Practices. The lack of systematic efforts to measure the impact of civic engagement efforts is widely pervasive among nonprofit organizations. During the Promising Practices research, organizational leaders were asked, "What evidence do you have to support your claims?" The typical response was anecdotal, "feel-good" stories with incomplete factual evidence to demonstrate achievement of stated outcomes. Nonprofits are unable to demonstrate the value of civic engagement because of a lack of documentation of evidence. When faced with limited resources, most organizations understandably focus on service delivery rather than building assessment and evaluation capabilities.

Emerging Paradigm. Among the promising organizations, there is increasing recognition of the benefit of data that documents the contribution of adults 55+ to program operations. Promising organizations understand the importance of evaluation in being accountable to participants, partners, supporters, and the community at large. They realize that giving service and documenting the value of that service goes hand in hand toward sustainability. An investment has to be made to define and collect data and establish information systems, even with limited resources.

Promising Pathways. Common themes were observed among awardees. Data collection is designed to meet organizational needs as well as external reporting requirements. Partnerships are developed with institutes of higher learning and experts when internal capacity is lacking. Standardized instruments streamline outcome measurements and soon become routine business of the organization. "Evidence" permits public acknowledgement of contributions by older adults, highlights the value of participation, encourages sustained commitments, and serves as a powerful outreach tool. Feedback is passé; "feed-forward," however, offers a way of improving toward the organization's preferred future. Continuous communications keep the initiative and its purpose in front of participants, partners, and supporters, and the community – all leading to broader support and more funding.

Principle 10. Reestablishing the Foundation of Community

Traditional Practices. We all seek reasonable solutions to our everyday problems and are practiced in breaking problems into their component parts to reduce complexity and make tasks more manageable. But an enormous price is paid when the measurement of outcomes becomes our reality and the intrinsic connection to the whole and each other becomes obscure. Fragmentation, insulation, isolation, and increased competition among local nonprofits results in a negatively charged community environment. Within communities and among organizations, opportunities for productive partnerships are passed by and leaders compete and become antagonists when they could be

collaborators. The pressure to assure accountability of public funds and the pattern of funding programs from both public and private sources are encouraging fragmentation rather than integration of community-based programs.

Emerging Paradigms. In organizations successfully engaging adults 55+, leaders were thinking and acting in ways that build “community.” Participants developed a clear, compelling vision of the meaning of community around which everyone could rally. They sought support, ensuring broadly inclusive participation representative of all segments of the community and key stakeholders involved in the initiative. They supported multi-generational activities and programs based on respect, mutuality and interdependence demonstrating that coexistence of all generations was “changing the face of aging” in their communities.

Promising Pathways. Promising Practice awardees were clear that they were not building an “organization” but a “community” in which people of all ages were empowered and wanted to live. They used surveys and systematic assessments of community members’ wants and needs at the outset of the process to create the new community design. This resulted in an expanded capacity to create results the community desired, where shared vision and common aspiration were the only guideposts, and where people were working to continually learn and improve together. Another critical principle across promising organizations was the belief that everyone has something to contribute regardless of background, experience, or training and that everyone, regardless of role, position, or standing in the community.

We believe these ten principles are guideposts to the future. However, the future they envision (embody?) looks different and may be at odds with many trends of modern society. The future they portend is based on concepts of “whole systems” thinking, community organizing and empowerment, and group development theory. Reframing our thinking based on these concepts gives the civic engagement of older adult community a means to construct a societal role for the new third-third of life and establish community contribution as one of its defining characteristics.

But to realize the future envisioned will require funders, policy makers and practitioners to shift their approach and expectations. The “quick fix” nature of modern society and the prescriptive nature of social policy must give way to approaches that embrace human development and strengthen the bonds that bind us together as a people. Through the application of these principles, we believe the field of civic engagement of older adults can realize the potential of life after 55+ being a transformative period of personal and civic renewal through contribution to the public good. In the process we believe that civic engagement, contribution to community, and building legacy will become hallmarks of the new third-third life stage. For more information please visit the RespectAbility web site at www.respectability.org.