

National Council on the Aging

RespectAbility:Focus Group Report

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EXECUTIVE SUMMARY

Background

In June 2003, the Atlantic Philanthropies engaged the National Council on the Aging and Lipman Hearne to develop a research program to support the NCOA's Civic Engagement and Veteran Journalists Project, later renamed the RespectAbility Initiative. The findings of this research will shape the work of the journalists whose support has been enlisted by the NCOA and will inform the public-interest documentary, technical assistance, materials, and strategies of the Initiative.

This stage of the research program involved eight focus groups and two pilot discussions with local directors and executive directors of the 19 national nonprofit organizations participating in the project. The objectives of the research were:

- To determine awareness and knowledge of demographic trends, especially the aging of the population
- To investigate the effects those trends may have on local nonprofit organizations
- To examine the ability of those organizations to respond to those trends
- To explore how the planned responses involve engaging older Americans as volunteers and paid staff
- To probe problems, barriers, and challenges that recruiting older adults into volunteer and paid staff positions poses for these organizations
- To understand the infrastructure and communication realities that will affect organizations as they attempt to tap the talents and experiences of older Americans

Methodology

Between November 18, 2003, and December 3, 2003, Lipman Hearne consultants conducted eight focus groups in four different locations—Philadelphia, Pennsylvania; San

Diego, California; Jacksonville, Florida; and Kansas City, Missouri. Those were preceded by two pilot discussions on October 19, 2003, in Houston, Texas.

The NCOA project team identified and recruited local directors of nonprofit organizations for these focus groups, so the participants were aware that the NCOA was sponsoring the research and may have answered questions with that in mind. Indeed, this work, like any qualitative research, did not yield statistically reliable conclusions about specific strategies or tactics. Instead, similar to the individual interviews, these group discussions provided valuable information about perceptions, opinions, attitudes, and planning that will shape the project's Web survey and inform the Initiative as it moves forward.

To elicit as much of this insight as possible, Lipman Hearne and the NCOA project team developed a moderator's guide, used for all group discussions, that touched upon the following areas and others:

- Understanding of demographic trends
- Uses of volunteers
- Efforts to recruit and retain older American volunteers and workers
- Challenges to implementing, sustaining, and extending those initiatives
- Solutions to those challenges

Issues Summary

In the course of the focus groups with local directors and executive directors of national nonprofit organizations, the following key issues emerged. These conclusions are examined in depth in the "Detailed Findings and Interpretation" section of this report:

- The aging of the population is one issue among many confronting local nonprofit directors and executive directors. Like national leadership, most local officials are concerned about how the growing number of older Americans will affect their organizations' abilities to deliver services. They tend to be so consumed by the

day-to-day requirements of running a local nonprofit that they have not developed a long-term strategic focus on the issue of the aging population.

- Many local nonprofit officials expressed some skepticism about the ability and willingness of the Baby Boom generation to commit to volunteer causes. A large contingent of people are seen working well into their 50's and 60's; others are believed to face the prospect of caring for aging parents; still others are perceived to lack the giving attitude and experience necessary to contribute to nonprofit organizations. Whatever the reason, most local nonprofit directors do yet not imagine substantial numbers of Baby Boomers lining up to support their causes.
- Several local nonprofit directors acknowledged that the shape of volunteer activities may need to change if they are to appeal to active older adults. In particular, they stressed that their organizations should develop different, flexible approaches to volunteer recruitment and management, especially to attract members of the Baby Boom generation. However, few have actually devised strategies or instituted tactics to accomplish this goal. Instead, with a few exceptions, they seem reactive and resigned to apply existing practices, such as volunteer clearinghouses and dispersed responsibility for volunteer management.
- Because many of the founders and directors of local nonprofit groups are reaching retirement age, they often relate demographic trends to aging in their own ranks. This has sparked questions about the smoothness of the eventual leadership transition. Many local directors expressed an unwillingness to depart because they are not confident that their successors will attend to the cause with the same passion they give it. Indeed, hardly any of the focus-group participants described a deliberate effort to nurture the next generation of local leaders.
- Many local nonprofit officials are developing a more refined understanding of the older adult population. Not only is there a fuller recognition of cultural, ethnic, and socio-economic divisions within the older-55 population, but local leaders are showing increased awareness of age-related divisions within the broader age

group. They see different attitudes, expectations, levels of activity, and priorities between the segments of recent retirees and people far removed from the workforce. But those differences have not, so far, sparked meaningful changes in services or efforts to recruit older volunteers and workers. In fact, specific tactics to recruit volunteers among ethnic groups appear much more widespread than attempts to attract volunteers in the over-55 age group.

- Geographic factors can also have a significant impact on efforts to recruit and retain older workers and volunteers. Organizations that operate in rural areas must tackle the family orientation of many small communities and the transportation of volunteers and workers over long distances to their assignments. In urban areas, the multitude of nonprofit organizations vying for the support of residents can spawn rivalries that inhibit the effective recruitment of workers and volunteers. City and suburban dwellers also enjoy a wealth of cultural and entertainment opportunities that might deflect their attention from nonprofits.
- Across the board, local directors and executive directors stressed that volunteer coordinators are the key to effectively recruiting and retaining volunteers. Many local leaders emphasized that a professional focus on volunteer management allows for more one-on-one contact, improves the deployment of volunteers, and enhances the services they provide. But few of the participating local organizations have a staff person dedicated to managing volunteers; they tend to disperse that function among many paid employees, who have myriad responsibilities of their own. For those organizations that are unable to employ volunteer coordinators, there are questions about whether they are reaching peak effectiveness.
- Corporate cutbacks, a desire to escape the rat race, and the attractions of nonprofits' service focus are bringing increasing numbers of former corporate employees into the nonprofit workforce. These developments present challenges to local organizations, which must incorporate the new employees into a culture with which they are not always familiar.

- Although local leaders generally recognize the value of collaboration, efforts to work with other local nonprofit groups have been inconsistent so far. Cooperation with local governments, businesses, and cultural communities appear much more systematic. In some cities, there is a real camaraderie among nonprofit directors, which spawns—or results from—a focus on volunteerism throughout the community. In others, organizations compete with each other and rarely communicate, hindering the efforts of them all.
- Due to the operational mindset shared by most local nonprofit directors, budgetary concerns figure prominently when they consider new strategies to recruit older workers and volunteers. The costs associated with health care and insurance frequently drive decisions to employ older workers, while the financial commitment to employ a volunteer coordinator often prevents organizations from recruiting and deploying volunteers effectively.
- Local nonprofit directors and executive directors stress that one-on-one interactions lead to better use of volunteers. From the request for help, through the application process, to ongoing recognition, the relationship with a volunteer is most fruitful when it is personal. Like many of the observations in this report, that applies to all volunteers and employees, regardless of their age.
- The National Council on the Aging and other national organizations can create forums for nonprofits to share practices and innovations. These forums would be especially effective if they disseminate strategies and tactics for creating, managing, and extending new roles for older paid staff and volunteers. One model for this approach might come from nonprofits' recent efforts and successes reaching out to diverse ethnic and cultural populations for volunteers and paid staff.
- Local and national nonprofit organizations have an opportunity to rethink how current volunteers, board members, and paid staff are ambassadors for their services and missions. Volunteers and staff can be a cadre of messengers who take a compelling story to various audiences—donors, volunteers and employees, civic

and corporate partners, service recipients, and the public at large. Shaping their perceptions and institutionalizing ways for them to communicate those positive perceptions can be effective ways to recruit new volunteers and employees of any age.

BACKGROUND AND OBJECTIVES

In June 2003, the Atlantic Philanthropies engaged the National Council on the Aging and Lipman Hearne to develop a research program to support the NCOA's Civic Engagement and Veteran Journalists Project. This Project, later named the RespectAbility Initiative, has two overarching goals:

- To increase awareness, understanding, and action among the general public, policy makers, and the voluntary sector about opportunities for and barriers to increasing the civic engagement of older adults
- To bring about changes in programs and policies to lead to increased civic engagement among older adults

The research program includes an organizational study of attitudes, experiences, and barriers related to the use of older volunteers and mature workers in the nonprofit sector. To clarify these issues, the research probes the organizational infrastructure and institutional support that organizations should build and maintain in order to recruit and deploy older adult volunteers and workers.

Key goals of the research are as follows:

- To deepen the understanding of structural, policy, and programmatic barriers and opportunities for engaging older adults in volunteer and employed positions to help meet needs of the community
- To examine the capacity of nonprofit organizations to use more volunteers and/or workers 55 years old and older, to identify structural and other barriers limiting their engagement, and to identify potential ways to overcome those barriers
- To learn from nonprofit leadership what government and the voluntary sector can do differently to increase the numbers of older adults involved in civic engagement as volunteers and employees and to learn which issues demand priority attention to increase civic engagement significantly among older adults

Four types of nonprofit organizations, which are all particularly important for engaging older volunteers and mature workers, were included in this research: faith-based organizations, youth service organizations, senior service organizations, and community service and development organizations.

To establish a firm foundation for the upcoming stages of the Initiative, the primary research consisted of three phases—individual interviews with national leaders of nonprofit organizations, focus groups with affiliated executive directors and directors in four regions of the United States, and a Web survey.

The work in the focus group phase of the research program was critical in moving toward several of the Project's larger objectives, particularly:

- Assessing awareness and knowledge of the aging of the population and its potential impact on nonprofit organizations at the local level
- Investigating the ability of local nonprofit organizations to address those demographic trends by using the talents and experience of older Americans in volunteer and staff roles
- Deepening the understanding of barriers to and opportunities for engaging older adults
- Examining the efforts local affiliates of national organizations have made and should make in order to tap the resource of older Americans
- Evaluating the infrastructure that already exists and enhancements necessary to engage older Americans as volunteers or paid workers at the local level
- Exploring strategies, policies, and program initiatives that might facilitate this effort

These eight focus groups were conducted in four locations representing different regions of the United States. The report that follows details the prominent issues they raised, offers interpretations of these findings, ties them to the results of the in-depth phone interviews with national nonprofit leaders, and presents implications for the final phase of the research, the Web survey.

METHODOLOGY

Lipman Hearne professionals conducted eight focus groups between November 18, 2003, and December 3, 2003, preceded by two pilot discussion groups on October 19, 2003. The formal focus groups ranged in length from one hour 30 minutes to two hours, while the pilot discussion groups were each an hour long.

Two groups took place in each of the following locations:

- Houston, Texas (pilot)
- Philadelphia, Pennsylvania
- San Diego, California
- Jacksonville, Florida
- Kansas City, Missouri

Each focus group consisted of seven to 12 respondents, who had been recruited by the NCOA project staff. The respondents were local or regional directors or executive directors of the local affiliates of these nonprofit organizations:

- Alliance for Children and Families
- Association of Jewish Family and Children's Agencies
- Big Brothers Big Sisters of America
- Catholic Charities USA
- Faith in Action
- Foster Grandparent Program Directors
- Generations United
- Girl Scouts USA
- Goodwill Industries International
- Institute of Senior Centers
- Interfaith Care Partners
- Junior Achievement
- Retired and Senior Volunteer Program Directors
- Salvation Army of the U.S.
- Shepherd's Centers
- Volunteers of America
- Women in Community Service
- YMCA of the USA

The pilot discussion groups were facilitated by Hap Bryant, Ph.D. The eight formal focus groups were moderated by Donna Van De Water, Ph.D.

To shape these focus group discussions, Lipman Hearne and the NCOA RespectAbility project team developed a moderator's guide that was used for all groups. Among the topics addressed in these groups were:

- Awareness of the aging population
- Effects of demographic trends on local nonprofit organizations, particularly on their ability to deliver services
- Barriers to recruiting older volunteers and workers
- Innovative practices and needed resources for recruiting and retaining older volunteers and workers
- Potential areas of collaboration among nonprofit organizations at the local level

Like any qualitative research, these focus groups did not yield conclusions that are statistically reliable or necessarily representative of a particular audience or market segment. Limited sample sizes, nonrandom recruiting, and the dynamics of group discussions all make the results of this research less than absolute. Nor are the responses necessarily factually accurate, reflecting as they do respondents' images and perceptions, not their well-researched or rehearsed answers to questions.

Instead, focus groups are especially suited to probing the underlying attitudes and patterns of thought of selected individuals, thereby producing an in-depth understanding of images, perceptions, associations, motivations, and beliefs. Indeed, these focus groups revealed significant insights about strategies, tactics, and behavior and shed further light on the issues the Initiative aims to address.

The full focus group moderator's guide appears in Appendix A of this report, while transcripts of the eight formal focus groups can be found in Appendix B.

DETAILED FINDINGS AND INTERPRETATION

This section analyzes the responses and comments of the local nonprofit leaders who participated in the focus groups. The directors' verbatim comments appear in italics, followed by the city in which those comments were made, while underlined text denotes key conclusions drawn from the responses.

Awareness of and Interest in the Aging Population

General

Although local directors and executive directors who participated in the focus groups understand the factors contributing to the growth of America's population of older adults, their responses to that trend have so far been largely uninspired. With a few exceptions, focus-group respondents did not respond passionately to questions about opportunities offered by the demographic shift, answering with fervor largely to express skepticism about the trend's positive results or to explain its impact on their organizations' services. This stance is similar to one taken by many national leaders interviewed in the first phase of the research: Their initial reaction to questions about the growing aging population was usually to describe how it would tax organizations' abilities to deliver services.

These responses suggest that the aging of the population is one issue among many that local nonprofit leaders confront. Their agendas are full of the daily exigencies of running a nonprofit organization, so they have generally given little attention to long-term strategic questions about the composition of the population. To a certain degree, national leaders appeared more likely to have thought about this issue from a strategic point of view—but even they were not terribly passionate about the issue. It should therefore come as little surprise that local and regional nonprofit leaders do not spend significant time or energy thinking strategically about the opportunities and challenges arising from the aging population.

Several have, however, drawn conclusions about the population of older adults from their day-to-day experiences with volunteers and service recipients. One widespread

observation is that older adults have different attitudes, priorities, and expectations than they had just a few years ago. Instead of “winding down,” they are still seeking active involvement.

One of the pieces of the challenge is, people are getting older, so what we thought of at 55 as being old, it's not old. And the people who are past a certain age could be more productive than somebody who's 40. So the challenge is to get rid of the term “over the hill.” (Philadelphia)

I just think that the 55-year-olds these days, I just don't look at them as seniors. They are very capable and very athletic. My brother is 55 or 56, and his is not quitting, he is not going to give up his dental practice and go volunteering and be at the [organization site] every day. (Jacksonville)

In addition to extended stints in full-time work, some people in their late 50's, 60's, and even 70's are taking more responsibilities at home, particularly in the upbringing of grandchildren. That is a trend in lower-income communities that could affect the services of nonprofit organizations by increasing the numbers and expanding the areas of people in need; on the volunteer side, it could reduce the numbers of potential volunteers. Several focus-group respondents made this observation, which had been, for all intents and purposes, ignored by the national leaders interviewed individually.

We have a significant number—we were actually looking at our database this morning and realized that we have a significant number of grandparents who are raising their grandchildren. And because I work with an office full of case managers and case workers and social workers, the discussion was sparked: How do we start a support group for those grandparents, because they have issues that parents don't have. (Jacksonville)

This was not the only area in which local directors provided a different assessment than the one offered earlier by national leaders. Unlike most leaders at the national level, many local nonprofit officials expressed some skepticism about the ability and willingness of the Baby Boom generation to commit to volunteer causes. This perception stemmed

from conclusions about the perceived priorities of members of that generation and about the financial and personal forces affecting them. Some are seen still active in the workforce; others are believed to face the prospect of caring for aging parents; still others are perceived to lack the giving attitude and experience necessary to contribute to nonprofit organizations. Whatever the reason, most local nonprofit directors do not envision masses of Baby Boomers lining up to support their causes.

I hate it when I hear all of this stuff that makes it sound like we're, like all those Baby Boomers are just cool and hip and we're going to be wanting to save the world again and all that. And I personally think there's going to be a lot of us Baby Boomers who say, "I've been there, done that. And we don't want it that much any more." (Kansas City)

We were commenting on the fact that some of the Baby Boomers just have not gotten into the giving and the responding to community needs and that maybe they are even still more concerned about "me" than some of the others. (Kansas City)

I was just saying that I think that the Baby Boomers volunteering is just blown way out of proportion. I don't think that they will be knocking our doors down to volunteer. (Jacksonville)

You would hear people say that they don't have time for their parents, and I think to myself—like you said—we will take care of our parents. I have taken care of my parents and my children and my grandchildren. That is all you hear now—I don't have the time. Where did we go wrong? (Houston)

This point of view stands in contrast to one expressed by many national nonprofit leaders. Their comments revealed a widespread belief that the Baby Boom generation's independence and active support of social causes would eventually lead many of its members to participate actively in improving their communities.

Civic engagement

Although some degree of skepticism colored the perceptions of many local nonprofit directors, they largely agreed that the combination of demographic factors—the impending retirement of many Baby Boomers and the extension of life spans in many communities—will have a profound effect on the voluntary sector. The eventual impact of those trends is the subject of debate: Will there be more volunteers to tap, will there be more people in need of service, or will it be a combination of the two?

Many local leaders who foresee growth in the ranks of older volunteers expressed the opinion that their organizations would enjoy benefits as a result. Similar to many national leaders, many local nonprofit officials said that older volunteers bring reliability and passion to their volunteer engagements.

If we have good volunteers, a lot of them are going to be the older volunteers because you know they are going to be there and you know that they are going to follow through and you know that they are going to have that passion. They will stick with it. (San Diego)

Although they recognize the dependability of older volunteers, local nonprofit officials do not all take this characteristic as a given. In particular, many people now passing the 55-year threshold seem less inclined to commit to traditional long-term volunteer roles. As a result, several focus-group respondents remarked, the shape and focus of volunteer engagements are in flux. This shift, also emphasized by national leaders and explored in several sections of this report, involves fewer long-term commitments and more flexible, project-oriented efforts. Those are the types of opportunities that are seen to appeal to the more active cadre of older Americans now filling the volunteer ranks.

We are out there pushing for volunteers now because people are so busy. If they are 65 or 70, they might fit you in for an hour and come to the senior center, but they are not doing that Monday-through-Friday-volunteer-all-day type of thing. (San Diego)

That has been a real frustrating thing for the [national recruitment organization's] folks who are involved in this older adult volunteer task force because the people from the

volunteer centers thought that the senior volunteers only stuff envelopes or tottered off to the nursing home, and they just did not realize what resources those older people are. (Kansas City)

As these responses indicate, several local nonprofit directors acknowledged that the shape of volunteer activities may need to change if they are appeal to active older adults. That observation jibes with the widespread recognition among national leaders that flexibility is extremely important in the effort to attract volunteers.

Service provision

Much as they recognize the necessity of altering volunteer roles, many local nonprofit directors emphasize the effects an aging population will have on the services their organizations provide. Many of the focus-group respondents suggested that the standard model of service delivered through the local senior center may become increasingly out of step with the needs and expectations of older volunteers, an observation that some national leaders had also made in earlier telephone interviews. In particular, as adults in their 70's and 80's lead more active lifestyles, they are unlikely to be drawn to centers where sedentary pursuits dominate.

When you talk about the Baby Boomers coming on, their technical skills are much greater than those seniors who have been aging in place for the last ten or 15 years, and so we have had to look at the services that we are offering. The ceramics that we normally would offer and things like bingo, that is just not going to cut it for the Boomers. (Jacksonville)

A 60-year-old is not stopping in the middle of the day to come in and have a hot meat loaf and mashed potato lunch because so many of them are working well into their 70's. So thinking creatively on what to provide for them—retirement seminars, computer classes are what they are there for, along with very early morning exercise. (San Diego)

A few years ago when I was working with older adults, the people who would come to our centers were usually—they had been stay-at-home moms, and their kids were all grown up. Now they needed something to do. Now, it's people who have had careers and are not content with just bingo and crafts any more. So it's a whole new awakening for a lot of us. (Philadelphia)

In practically all the focus-group cities, there was a shared understanding among local nonprofit directors that the ways they provide service would change in fundamental ways as a result of demographic shifts. Even in Houston, where the discussions centered on one nonprofit group's experience, the responding members acknowledged that the increasing numbers of people requesting help would tax existing structures.

Indeed, many local nonprofit directors see service provision as the area in which many demographic trends converge. Longevity, growing numbers of recent retirees, grandparents raising children—those developments seem to be viewed by local nonprofit officials through the lens of service provision. From their perspective, it's all part of the same issue—how will they accommodate people who need assistance.

Some of our grandparents feel guilty that their children are not capable of raising their own children. And so they don't seek services because they don't want to admit that they did something wrong that their kids cannot take care of their children.

(Jacksonville)

I was just thinking that the demographics of our volunteers almost identically match the demographics of the clients that we serve. (San Diego)

That will not be the case with every organization because, some nonprofits, by definition, match adults with one young person or a group of young people. Still, within some organizations, increasingly fluid relationships appear to be developing between volunteers and recipients of service, with older Americans attending to the needs of people in their age cohort.

Nonprofit leadership

A similarly close age connection is emerging between volunteers, the people they serve, and the leaders of local nonprofit organizations. Because it is not unusual for the founders and directors of local nonprofit groups to be approaching retirement age, many of them relate demographic trends to aging in their own ranks. Those who participated in these focus groups were prone to wonder whether the move away from their current roles would be smooth—both for them and for the organization. Many expressed a reluctance to depart, largely because they are not fully confident that their successors will attend to the cause with the same passion they had given it. Indeed, hardly any described a deliberate effort on the part of their organizations to nurture the next generation of leaders at the local level. If the comments of national leaders during their interviews were representative, a similar omission exists on the national level.

To some extent the challenge to nonprofits is not finding seniors, but what are we going to do about the fact that we're all seniors? The top management in the majority of nonprofits in this country are already 55 and above. That's certainly the case in my agency and all of the national studies are telling that—that the discussion in the nonprofit sector is a leadership gap when all these people start to retire. (Philadelphia)

And then when I really think about it, I think that I really have been looking for [in] the last several folks that we've hired into the program, "Will this be the person to take over for me? Will this person invest that much into the program and have the passion for it?" And that's why I'm not finding anybody who fits the job. (Kansas City)

These succession issues are even more important because, in many cases, the current and outgoing leaders of local nonprofit organizations are the people who grew up with those enterprises and established their structures.

I think a lot of it is the longevity on the job. We have a lot of people who have been there, one that's been there 33 years. Many of them have been there 15-20-some years, so they've kind of grown up with the agency, as well. (Jacksonville)

As that original leadership and its institutional knowledge moves into less prominent roles, some local directors have questioned whether organizations will lose some effectiveness. Still, several of them who are nearing retirement age also recognize that their reluctance to leave could hold their organizations back. Some respondents observed that the nonprofit sector employs many people who are "retired in place"—those who have a job but direct their energies elsewhere. Many trust colleagues or subordinates to urge them into retirement, which is perhaps not the best strategy to ensure effective management or operations.

We have to be honest with ourselves about when it's time to go. When it's time to step aside and let somebody else step in and not try to hold on too long. I've had peers who have held on way too long, and they ended up with bad experiences and

the organizations suffered from it. And so for those of us who are older in the workforce we really need some mentoring along about how to make decisions, and I kept telling my staff, “Look, when you see me staring out the window and looking at the trees, you need to tell me because it’s time for me to go.” (Jacksonville)

As this person suggested, the aging of the population is a personal matter for many local nonprofit leaders. Their peers are preparing to retire from organizations that many of them built and shaped. That makes many local leaders acutely aware of the demographic trends—if only in the here and now and not as a strategic opportunity.

Divisions within the Older Adult Cohort

By age

Local leaders are beginning to recognize that generalizations about older workers and volunteers are becoming increasingly untenable. Based on their experiences, many local nonprofit officials are developing a more refined understanding of the older adult population, particularly when it comes to age-related divisions within that broader age group. During several of these focus groups, respondents described significant and growing differences, for example, between 60-year-old retirees and near-retirees and 85-year-old retirees.

I really think that, it’s an obvious statement, that people who are either newly retired or Baby Boomers versus the old older adult are just at different times of life. And that when you’re age 55 or 60, basically, your physical energy level is greater. Your desire when you first retire is to be unattached to anything in a real specific kind of way, and to just experience the sense of not having to go to work puts you in a little different spot. Whereas by the time you get to be 70, 75, 80, you may not be needing or wanting to travel quite as much in the same way. (Kansas City)

For some nonprofit leaders at the local level, the telling factor is not age but the length of time since leaving first careers. Recent retirees bring a different attitude to their involvement with nonprofit organizations, whether as employees or as volunteers, than

do people who have been out of the workforce for longer periods of time. According to some local nonprofit directors, the result often is different expectations.

I wonder if what the person wants in the volunteer experience is different depending on where they are on that range of being an older adult. Is the person coming right out of the workplace looking for something that is more like the workplace? (Philadelphia)

I think it's not so much a matter of age as much as it is how long they've been out of the workforce that makes the difference, because I think whether they come right out at 60 or 65 when they retire and get right involved, they're still "working," gung-ho, man, "I've got a lot to offer here," and jump right in. But if it's been a long time, then they come in with a little more insecurity and they're not sure how they might fit, etcetera. (Jacksonville)

It may not be surprising that the 60-year-old who has just left a full-time career has different priorities, interests, and expectations than the 85-year-old who retired long ago; what is notable is that those differences have not yet sparked significant changes in services or volunteer recruitment efforts. Given the bulge soon to appear at the lower end of the retired age range, how much longer can the status quo hold?

I think that there is also a different attitude among people that are 55 and 60. They don't think that they are old. So I think that they are looking at their stage in life differently. Maybe in the future we will be recruiting 70- and 75-year-olds to be dealing with that. (San Diego)

Tellingly, this person did not suggest that nonprofit organizations develop new strategies to recruit volunteers among younger older adults. Instead, the answer, for this director, lies in shifting the focus to those adults 70 years of age and older, who can more easily fit into the existing structures of the organization. The requirements of the organization, not the volunteer, thus seem to be paramount on the local level. National leaders, who are not as tied to the operations of local agencies, did not appear as wed to existing structures and practices and may be more apt to consider different strategies to address the varied interests and expectations within the 55-plus age cohort.

By ethnicity or culture

There was much more local interest and a keener strategic focus on different ethnic and cultural groups within the older adult population. In all the focus-group locations, at least some nonprofit organizations pursue members of ethnic communities as volunteers, and some had established centers in neighborhoods dominated by a particular group.

Diversity appeared a much more widespread strategic priority, and the policies seemed more purposeful among local nonprofit directors than they seemed among national leaders, with a few exceptions.

I really believe that if you want to be an inclusive organization you have to be very, very intentional about it. And it has to be an ongoing goal that you're really committed to—it doesn't just happen. (Kansas City)

Such a focus is particularly important to the local directors of organizations that provide substantial services to members of ethnic groups. Whether they are attempting to reach Laotian or Korean clients in Philadelphia, African-American or Hispanic clients around Jacksonville or Kansas City, or Hispanic or Native American clients in and near San Diego, organizations have revised their practices to address the specifics of each group.

Getting the [members of] different cultures to volunteer, it all depends on where they are at in terms of being integrated into the country itself. (Kansas City)

Yet, to one degree or another, almost all the local affiliates participating in this study have considered strategies to reach out to ethnic communities. Their efforts to attract volunteers and paid staff from these audiences could serve as models for attempts to recruit volunteers and staff from the older-adult population. Even the challenges and setbacks—explored in greater detail below—could be used as a guide as local and national nonprofits seek to attract more members of the above-55 age group.

By geography

Nonprofits also discover differences in their service and volunteer audiences depending on the geographic areas in which they operate. Potential volunteers in cities, a population

within which significant divisions exist, often find themselves courted by many nonprofit groups at one time while multiple entertainment and cultural opportunities vie for their attention and support. As a result, their loyalty can be particularly difficult to win and keep. Suburban dwellers who might volunteer for nonprofit organizations or, in some cases, receive service from them, can fall through the cracks because they may be recent arrivals, on the move, or unaware of community-based organizations. Rural residents, for their part, often have stronger connections to family and faith communities than urban or suburban groups do, and social services in rural areas are often delivered through those frameworks rather than through secular or ecumenical nonprofit organizations.

In addition to those nuances, each community has a different spirit. Whereas in Philadelphia, nonprofit organizations appear to operate on their own, groups in Jacksonville often work together through such organizations as the United Way and Volunteer Jacksonville to recruit and deploy volunteers effectively through the entire community.

Yeah, no one is making it known what they now can offer and handle.

(Philadelphia)

Meanwhile, nonprofit organizations in San Diego and Jacksonville face the issue of transient retirees much more directly than do groups in Philadelphia or Kansas City because large groups of older people make seasonal migrations to Southern California and Florida and steer clear of the Northeast and Midwest.

Current Practices

Operational thinking

Although nods are made to “intentional” policies and tactics in volunteer recruitment, local nonprofit directors are geared toward operations, rather than strategy. As a result, they tend to seek volunteers and employees in ways that do not require alterations to their current operational structures. Focus-group respondents expressed willingness to

use whatever volunteers come their way, but they presented only a handful of strategies for recruiting volunteers.

What happens is you take on the ones that come to the door. But you're not out there beating the bushes and finding the ones who might be wonderful volunteers, at least in our agency. But anyone who comes, sure, we'll find something for them to do. (Kansas City)

Few local nonprofit directors who participated in the focus groups offered a contrast to this point of view. More frequent were confirmations that volunteer recruitment in general, and the recruitment of older volunteers specifically, is not a high strategic priority.

We have talked about targeting specific groups, as far as ethnic groups and how to target the different age groups slightly, but not specifically the seniors. (San Diego)

Even more telling than such admissions was the course of the focus-group discussions themselves. Respondents rarely linked the aging of the population with their organizations' volunteer opportunities, even though they had been asked at the outset to describe the roles volunteers take in their organizations. Only after direct questions about efforts to recruit older volunteers did local directors normally offer any insights about recruitment and deployment of that volunteer segment. This, again, suggests that the issue of older volunteers does not figure prominently in the thinking of local nonprofit directors.

Varied levels of flexibility

Because strategic planning around volunteerism seems limited, it should come as little surprise that only a handful of participating local nonprofit organizations have developed flexible approaches to volunteerism. Most appear to stick to their current practices and hope that volunteers will fill predefined needs.

The hardest thing is when they say, "I have this wonderful older person who wants to volunteer, but they don't want to do any of the things that I have." People don't

understand that unless they want to drive or cook or—in a little agency how are you going to find something for them to do? (San Diego)

Such statements reveal the underlying focus on the day-to-day requirements of the local nonprofit. Some local directors did express some regret about this limited vision, but, by and large, their perspective could be characterized as “resigned.”

We don't serve volunteers. We only have one job from them, and so we offer none of the kinds of things that I think active seniors [want]. We don't offer social interaction, and that is something that a lot of people seek in volunteering, whether it is coaching a team or that kind of stuff. We don't offer that. (Kansas City)

Due to this generally resigned attitude, few local nonprofit directors have devised strategies to make their organizations more flexible. Still, many of them recognize that their organizations should develop different, more flexible approaches to volunteer recruitment and management, particularly as the demographics change the potential volunteer pool.

I think that the not-for-profits kind of ruined the word volunteering because we have brought people in to lick envelopes or stuff like that. People will go, “I don't want to do envelopes.” So I think that not-for-profits need to explain to people that we have a lot of opportunities, and let us educate you or inform you about them. We need to get them to do what they like to do as opposed to putting them in a room to lick and stamp envelopes. (Jacksonville)

When you have an older adult that is enthusiastic about doing something, sometimes they don't meet the requirements, but don't lose them. Don't deflate that enthusiasm, but make sure that they at least have a venue, someplace that they can go and, if not with your agency, then you need to refer out just to make sure that they continue on their quest. (San Diego)

In a few cases, revelations such as these have sparked a shift in strategies for recruiting and deploying volunteers.

The other piece, regarding the fit, we provide them a menu of options. So maybe they come in, and they want to be a [mentor], but we feel that they are not appropriate, and so then we will go over with them the other choices that are available. Maybe they would like to help us with an event or do the newsletter or help with decorating for a party of something like that. (San Diego)

It's interesting that the person who made this statement, a director of one particularly innovative local organization, works under the same national framework as another director who talked about how little flexibility exists within that structure. So considerable variety and autonomy can characterize the approaches of the same national nonprofit organization's local affiliates.

Reliance on volunteer clearinghouses

In addition to using volunteers who walk in their doors, some local nonprofits recruit volunteers through volunteer clearinghouses. They often solicit the help of nationwide organizations with local affiliates, such as the United Way, or city-specific groups, such as Volunteer Jacksonville. These bodies maintain lists of volunteer opportunities in local nonprofits and attempt to match those engagements to people who contact them for guidance.

But the United Way has a volunteer database now that anyone can tap into. If you are looking for a volunteer opportunity, all of the United Way agencies would post our volunteer opportunities in this database, which people can access through the Internet, and so they can just go in and pick what they want to do. (Jacksonville)

I think that Philadelphia Cares is an organization that provides that kind of resource—opportunities and volunteers. I think. I think the United Way when I'm looking for volunteers. (Philadelphia)

There are sometimes drawbacks to using these clearinghouses to handle the bulk of an organization's volunteer recruitment. For one thing, they are not yet able to investigate each potential volunteer's interests, skills, and expectations and find a specific volunteer

engagement that speaks to those. That is especially the case for people emerging from careers with a certain level of sophistication and professionalism.

We've tried to work with [a clearinghouse] to recruit volunteers for us. We never got one...because of what they can recruit a volunteer to do. For example, our Web master—that's not someone that in theory you're supposed to be able to recruit through volunteers... They have very specific restrictions, and they tend to be around those direct, hands-on, I'm-going-to-help-you-across-the-street-with-your-cane. (Philadelphia)

In other words, much like many of the organizations in the study, volunteer clearinghouses are often viewed as lacking flexibility. Some participating local nonprofit leaders pointed to a better approach, which would involve more personalized contact with volunteers.

Importance of volunteer coordinators

Local nonprofit directors who participated in these focus groups were quick to stress how vital volunteer coordinators are in the effort to recruit, retain, and deploy volunteers. In this regard, they share the opinion of national leaders, who placed special emphasis on the role of the volunteer coordinator during their individual interviews. Volunteer coordinators take on such importance because they provide one-on-one contact with potential and current volunteers and can gear recruitment and deployment to volunteers' interests. This not only establishes a level of flexibility in interactions with volunteers; it also enhances the services a local organization provides.

And so the applying and the screening and the training seems to me to be extremely important, because not every one of these seniors fits every one of the positions we have. (Jacksonville)

From everything that I have read or heard—and I believe it—you want to treat [volunteers] as if they are an employee in the sense that you are going to give them the time to train them, to make sure that they know the layout and that they know

what they are expected to do.... So I think that it is just the staff time to oversee that.
(San Diego)

Our program's based on having thousands of volunteers, so we have a paid position that makes those matches and makes it happen, because it's just absolutely necessary. But I've been involved in several organizations where the struggle has been, "Can we justify this? How do we fund this? How do we make it work?"
(Philadelphia)

Although focus-group respondents generally acknowledged the necessity of volunteer coordinators, few had found ways to keep one on staff. Indeed, most do not have a paid volunteer coordinator and disperse that function among many paid employees, who have myriad responsibilities of their own. The responses to this state of affairs ranged from consternation to resignation.

I think it's a change of attitude of staff as far as that—that it's worth investing in this.... We need a change of mindset of staff who are in the hiring positions. And also we're so darn thin on staff, who has the time to give to that? (Philadelphia)

A business like that would never look at 600 employees producing this amount of hours and think you only needed one part-time person who didn't have any skills and didn't get paid much to manage those folks. But when you talk about volunteers, somehow it's like then that organizations say they're not meaningful. We can put anybody in here to manage them who doesn't have any skills or abilities. And sometimes, you get exactly what you've asked for. (Kansas City)

As a result, the lack of a paid volunteer coordinator can hamper a nonprofit's efforts in several respects. It detracts from the organization's ability to recruit and retain volunteers because potential volunteers do not receive the personalized service they might expect; it reduces the nonprofit's potential to deliver services because the best suited volunteers are often not assigned; and it chips away at organizational efficiency because employees have to take time away from their other duties to handle volunteers. The overall effect on

those organizations without volunteer coordinators tends to be a haphazard approach to volunteer management and service delivery.

Employment issues

On issues related to older employees, local nonprofit directors and executive directors who participated in focus groups were of a mind with national nonprofit leadership. Both sets of leaders tended to emphasize the trend of “second-career workers,” particularly those who once worked in the corporate sector, and they generally recognize that their organizations need to be flexible when dealing with these employees. According to several of the focus-group participants, these matters are becoming more common. Corporate cutbacks, a desire to escape the rat race, and the attractions of nonprofits’ service focus have brought greater numbers of former corporate employees into the nonprofit workforce.

Unemployment’s very high. A lot of people have been downsized and their opportunities have also been lessened and, for a variety of reasons, [they] may elect to go with a nonprofit, thinking that this is a nice opportunity for them, and maybe in the service industry there are more jobs opening right now. (Philadelphia)

Integrating these new workers involves both cost considerations and organizational development issues. Specifically, focus group respondents occasionally noted that local nonprofits should devise benefit plans and employment arrangements that appeal to older workers, whose expertise can more than recoup the resources spent to tweak existing systems.

We have very specific policies, but ideally we can hire a part-time person, maybe 55 and older, who is looking at this part-time career as a—we call it double-dipping—they are already receiving a retirement check, but they just need a little something to support that income, and thus, ideally, the person that we are looking for does not really need a whole lot of benefits because their kids are already out of the nest and so forth. (Jacksonville)

When this idea of flexible benefits was probed with other local directors, however, few appeared to consider it a priority. Instead, they tended to question how they would integrate newly arrived older workers, especially those from the corporate sector, into their nonprofit organizations. People who leave the for-profit world confront a nonprofit

culture with which they are not always familiar. The pace of decision-making, for example, appears to frustrate some of these “second-career” workers.

I read an article recently where they had done a study of people leaving the for-profit world and going into the not-for-profit world, particularly in executive positions, and found that they don't stay long.... Because the environment operates different, the financial aspects of it and the decision-making process. (Jacksonville)

Several of the focus-group participants faced these issues themselves when they moved from a for-profit enterprise into a role with a nonprofit organization. Although they have stuck with their new careers, several did not hold back in expressing their puzzlement with the workings of the nonprofit.

People tell me that I am too impatient, but where we got things done in a day, now it takes six or eight months. (San Diego)

In these focus groups, many of the local nonprofit directors who had made similar career changes made observations about the awkwardness of that transition. Incorporating these experienced hands is thus one of several key challenges faced by local nonprofit organizations.

Challenges to Engaging Older Adults

Communication and collaboration

As the consensus around the need for volunteer coordinators indicates, local nonprofit directors who participated in this study generally recognized the importance of clear and effective communication with volunteers. One key element of that communication, according to several focus-group respondents, is a convincing case that volunteerism is necessary and that one person can make an impact.

I think that one of our biggest challenges is to help people in communities understand [that] it is what I call a different world out there for so many kids ... and

people do not have access or interaction with those families and those children, and they have no idea how difficult it is. (Kansas City)

In addition, several stressed the need for a compelling organizational identity that shows how a nonprofit will use volunteers' skills.

If an agency or an organization does not have a clearly defined "what they need their volunteers for," they're not going to attract people. Your identity is so very, very important to attracting anybody, whether it's new employees or volunteers. (Philadelphia)

Equally important are communications inside the organization. For instance, several local nonprofit directors recounted stories of awkward exchanges between young staff members and older volunteers. These interchanges—and their fallout—convinced the directors that their staffs needed training to communicate across generational lines.

I mean, if we have a 20-year-old girl asking a 70-year-old man about sexual issues [as part of a standard background check or interview], that usually does not fly. So I think a lot of it is sensitivity training for our staff and how we speak with people that are 50 and older. Even though you are the paid person and they are the volunteers, you need to be very respectful. (San Diego)

Similar concerns emerged from interviews with national nonprofit leaders, who acknowledged that both older volunteers and older staff members could leave organizations if they are addressed in unfamiliar or uncomfortable ways.

At the same time, local nonprofits face challenges communicating and collaborating with each other. In some areas, local directors show a real camaraderie, which gives rise to—or results from—a focus on volunteerism throughout the community. Those ties seem strongest in small towns or rural areas in which the local directors know each other and see themselves as contributing to the same cause.

It is a lot easier for us because we are in a small town. There are 20 of us executive directors across the basin, and we all know each other and talk to each other, so it is a lot easier than in a big city. (San Diego)

In many urban locations, the bonds do not appear to be as strong. Organizations in those cities are more likely to compete with each other and communicate less than frequently, hindering efforts to build an extensive network of volunteers and ultimately limiting the reach of all nonprofit groups. All in all, efforts to work and coordinate with other local groups are inconsistent.

Cultural differences

Arising from the previously mentioned ethnic and cultural divisions within the cadre of older adult volunteers, significant hurdles stand in the way of local nonprofit organizations as they attempt to recruit and retain volunteers from diverse communities. Many of the local directors who participated in these focus groups acknowledged the need to adjust their approaches to accommodate the specific interests and heritages of resident ethnic and cultural groups.

We've had to hire staff support that is bilingual and fluently bilingual. It really makes a difference when you're interviewing people, counseling people, training people. You have to have the words and the phrases and the understanding of the culture, the differences, in order to do that. (Philadelphia)

When I first started a few years ago, there was kind of this separateness. The Asians would stay on this side of the room, and the African-Americans were over here, and the whites were over here. There was no commingling, and I thought that we have got to stop that. I just did not feel comfortable with that kind of separateness. I started implementing a cultural appreciation during in-service [training].... (San Diego)

In the Minneapolis area, we have a Laotian and Mung population, and they are pretty good about volunteering, especially when it comes to our toy shop and helping to get the families through in that area. In Devil's Lake, which is an Indian reservation up in North Dakota, we have several that are volunteering up in that area to help with the children in the Indian population there. (Kansas City)

Indeed, organizations that are effective in recruiting volunteers from the African-American community have learned to reach out to religious congregations, which are the focal point of community activity. Other groups, such as Hispanics and Native Americans, call for slightly different strategies that focus on family networks, and several organizations have responded accordingly.

Yuma County has a very large Hispanic population, and 75 percent of our staff is bilingual, and we go out into the field and recruit. So we will go out while they are on their break, and we have our boots on, and we stomp in the mud, and they feel that if you can stomp in the mud, you are okay. But that is the way it is. They will not come in to your office, and they will not call you, and so you have very different recruitment strategies and ongoing support as well. (San Diego)

As these comments indicate, several local nonprofit organizations have instituted specific strategies for recruiting volunteers among ethnic groups; in fact, those efforts appear much more widespread and systematic than do attempts to attract volunteers in the over-55 age group. That has significant implications for this project.

Geography

Much as the ethnic and cultural segments of the older adult population challenge local nonprofit organizations' attempts to attract volunteers, geographic differences create tests for nonprofit groups. The traits and priorities of volunteers in urban areas can be different than those of rural residents, as this report explained earlier. In addition, there are logistical challenges that are specific to localities. The physical layout of some cities and towns may not be conducive to community activities, including volunteering.

I have worked with hospice in the Palm Desert Rancho Mirage area, and there is no sense of community there. None at all. It is very spread out and we are only 45 miles away from that area and ours is a very strong community. Everyone knows everyone, and they know what the services are and how to access them. (San Diego)

In communities that are not compact, transportation is also frequently cited as a major issue for nonprofit organizations. Some older Americans no longer drive, cannot afford their own transportation, are fearful of driving in unfamiliar downtown areas, or do not have access to public transportation, so they require transportation. If they are going to volunteer, a bus or a ride service has to take them there, or they are unlikely to go.

We're in a rural area, so we have four buses to carry them around and get them to their sites and back, because otherwise they would not be able to volunteer at all

because we don't have any kind of transportation out there except what we provide.
(Kansas City)

That problem does not end at the city limits. Many nonprofit directors in urban areas noted that efficient public transportation is critical to their ability to deploy older adult volunteers. The more difficult the travel, the more likely it is that potential volunteers will want to keep their activities close to home.

They do want to volunteer close to home, so we try to find somewhere that's close to home because a lot of them don't drive anymore.... They have to catch the bus, and they'll tell you, "I don't want to catch two buses, so can I volunteer near my home?"
(Jacksonville)

I think transportation is often a concern for older people. I know even in my program the school that's available, with some of the volunteers that were recruited, that was a concern: How far away is the school? If it's not in my neighborhood, why would I go over there to volunteer? It's too far away for me to want to travel to.
(Philadelphia)

Indeed, in almost all locations, at least some focus-group participants mentioned the difficulties transportation posed for their local organizations. Among national nonprofit executives, this issue did not receive as much attention, probably because they are less likely than local officials to dwell on logistical concerns.

Another geographic consideration affects nonprofit organizations in warmer climes: the influx of older residents during the winter months and their subsequent exodus during the summer. These "snowbirds" are difficult to incorporate into highly structured volunteer programs because they cannot make yearlong commitments. Still, some nonprofit groups have devised ways to use the skills and energy of snowbirds while they are in their seasonal residences.

I have two volunteers who are snowbirds, and they told me when they came to me. I did welcome them with open arms, but they had been to three or four other agencies

in the community and had really been turned down, dismissed, and discounted because they could only be there for six months out of the year. (San Diego)

Migration patterns and other local factors may not be driving forces behind national policies, but responses during these focus groups indicated that some innovative local nonprofit organizations are adjusting their tactics to address the realities on the ground.

Cost concerns

Due to the operational mindset of most local nonprofit directors, budgetary concerns figure prominently when they consider new strategies to recruit older workers and volunteers. The costs associated with health care and insurance frequently drive decisions to employ older workers, while the financial commitment to a volunteer coordinator often prevents organizations from recruiting and deploying volunteers effectively. Although national leaders recognized these concerns, they did not dominate top-level executives' thinking about older workers and volunteers in the way that they appeared to affect almost every decision at the local level.

Time and again, local nonprofit leaders who participated in these focus groups expressed concern about the rising costs of health care and its effects on all workers, regardless of age. The worry was particularly acute for older workers, whose insurance requirements can cripple the limited budgets of local nonprofit organizations.

He brought up something that I think is the biggest detriment to hiring older people, and that is the health insurance. The premiums have skyrocketed and just jumped not just 20 percent but some 30 and 40 percent, and the older the staff members are, the higher those premiums go. I am heavy in people who are older because they are loyal employees and they are there every day and I don't have to worry about them. They are just excellent employees, but it kills us on health insurance. (Kansas City)

Nonprofit organizations have reacted to this burden differently. Some have recognized that the primary reason many older workers come to them is for health insurance, or for the income to supplement their own health policies. Others are considering policy

changes to blunt the effects of health-care costs on the organization's budget. One of those shifts, long evident in the private sector, is a more concerted effort to hire part-time workers who are not eligible for health insurance.

How many more nonprofits can continue paying big insurance premiums when they can get a part-time worker and not have that encumbrance? So I think you're going to see more of that as the Boomers reach that age when they don't have to work full-time. I think the nonprofits are going to look at that pool and consider them as viable employees working on a part-time basis where they don't have to pay out benefits for them. (Philadelphia)

Financial considerations also tend to govern many nonprofit groups' involvement with volunteers. In particular, because they struggle to find the money to employ volunteer coordinators, local nonprofits frequently have difficulty recruiting and deploying volunteers effectively.

Often where there are cutbacks, financial cutbacks, the first position looked at—if you have the luxury of a volunteer coordinator—that position is cut, and someone else has to absorb it. (Kansas City)

That is the one thing that is the hardest, because as organizations downsize and lose money, the first person to go is the volunteer coordinator. It is like, "Oh, we don't need that person." (Jacksonville)

Many of the focus group participants bemoaned this state of affairs, but they were rarely able to describe attempts to realign their organizations' budgets accordingly. As such, few have established volunteer coordinators as a priority.

There are other financial considerations affecting local nonprofit groups, such as background checks of volunteers, but, unlike national leaders, local nonprofit directors did not put these high on their lists of challenges. Instead, they stressed health insurance for employees and the costs of employing staff members exclusively to manage volunteers.

Opportunities for Engaging Older Adults

Collaboration

Although few local nonprofit directors could recount extensive efforts to work with other organizations to recruit older volunteers and workers, many see promise in such collaboration. Some of the focus-group respondents extrapolated from their successes with collective efforts to deliver services, which have shown them that collaborations can help their organizations fulfill their missions. Others perceived the challenges as so large that one organization cannot tackle them by itself.

There is also the issue of the frailer population—the affordable housing needs, the prescription needs and the care-giving needs have become so great that people have got to pay attention, and the only way that you can do that is in a collaborative way. You have got to link with other agencies to be able to respond to the needs. They are getting huge. (San Diego)

Recognizing the need to collaborate has not yet led to an acknowledgement among most local nonprofit leaders that they should combine their efforts to recruit older volunteers and workers, however. That is not because they refuse to use outside sources for volunteers—the widespread reliance on volunteer clearinghouses indicates how willing many local nonprofit groups are to turn outside to find them. They also work actively with local governments, communities, and businesses to increase their pools of volunteers.

Also within the city of Jacksonville in recent years they have built a division called Volunteer Services, where they actually help to recruit volunteers for various community based activities. So it is actually built into the city structure.
(Jacksonville)

We have three very large Indian tribes in our area. One of the casinos does a large event for us, and so their tribal council encouraged the members of their tribe to

volunteer for us, but we had to do a mentoring program in the elementary school on the reservation. So they will mentor their own if their tribal council asks. (San Diego)

We have even gone to businesses like Honeywell and US West. They all have senior volunteer groups that will gladly come out. It is more of a time-related date where they will come out for a couple of days. They seem to be seeking opportunities to come out and volunteer. They even have coordinators that will seek them out as well. (Kansas City)

To this point, however, such cooperation in volunteer recruitment has rarely extended to other local nonprofit groups. That presents a significant opportunity, one that, before budget cuts intervened, groups in California were preparing to capitalize on through Life Option Centers statewide.

That was a place where people could come—mainly Baby Boomers, but it could be anybody—and there would be a whole array of volunteer opportunities and some job opportunities based on their community. (San Diego)

Local directors tended to see it as unlikely, given the financial constraints faced by most state and local governments, that such policies will gain any traction soon. As a result, local and national nonprofit organizations will probably have to make collaboration among themselves happen without a push from government. They may face organizational obstacles to pursuing these joint ventures, but the immense potential of these efforts should not be ignored. According to many of the national executives who participated in this study, such cooperation is under consideration at the national level; it remains for local directors to pursue these links and to institute them so that they will benefit all the organizations involved.

Advance communication with candidates

As several local nonprofit directors noted during these focus groups, nonprofit organizations must present a clear message to potential volunteers. One way to accomplish this involves revising the ways they contact candidates. Local nonprofits

would not simply wait for volunteers to come to them, either through their own doors or by way of a volunteer clearinghouse. Instead, local groups would reach out to potential volunteers with compelling communications tailored to their interests. Some local directors see the Internet as particularly effective in this regard.

More and more, with Baby Boomers it's going to be Internet volunteer opportunities that are made available and hopefully personalized enough for people to understand what it is they're saying yes to—or what the job is. I think more and more that's going to be one way of providing communication. (Philadelphia)

Some are also quite mindful of the image they present to potential volunteers, whatever the form of communication. These local directors want to reflect accurately the nature of their volunteer engagements, but they seek to frame these in attractive terms.

When I first came to the agency 10 years ago, our recruitment materials and promotional brochures and things like that—oh, my God—it looked like you had to be a brain surgeon before you could volunteer. It looked hard and scary, and “people are sick and dying and they need you!”... We didn't do clowns, but that was a good idea. But that's what we tried to do—was lighten it up, make it sound like this is fun. Be a friend. Have a cup of coffee. Talk about the weather. Go watch old war movies. We try to make it sound like it's fun instead of, “Oh, this person is dying, and their wife needs to go shopping, and you need to come and sit with them.” (Kansas City)

This local director exhibited an awareness of how marketing can improve nonprofit organizations' efforts to recruit older volunteers and workers. Before they approach an organization or receive communications from one, potential volunteers have formed an image of what participating in that organization's activities would be like. It is therefore important that nonprofit organizations manage their messages in an effective way, which usually means tailoring their approaches to individuals' interests and expectations.

Individualized contact

Many key aspects of these findings—from the importance of the volunteer coordinator, to the recognition of significant age, cultural, and geographic differences among volunteers, to the acknowledgement of the need for greater flexibility among local nonprofits—point to the opportunities presented by individualized contact with volunteers. Local nonprofit directors, like their national leadership, appear to grasp the notion that blanket approaches to recruiting and retaining older volunteers and workers—or, for that matter, any volunteers and workers—lack effectiveness. They stress one-on-one interactions that lead to a better understanding of volunteers’ skills, expectations, and priorities.

For some organizations, this level of contact begins with the request for help. When they send out appeals, they try to make these as personal as possible.

They also need to be asked personally. That’s how our volunteers get to where they are. They are given a personal invitation. They know that someone’s interested.
(Philadelphia)

Other organizations gear the application process for volunteers to those individuals’ expectations. In particular, they have professionalized the process, turning it into a job interview, in order to appeal to people recently retired from corporate life.

I think that with men coming in, once we started interviewing and it was more of this formal thing, the husbands started coming along and were willing to go into volunteering.... And they enjoy this more formal corporate interview process, and now their jobs have kind of risen to that level of experience. (Kansas City)

The personal level of contact ideally continues once the volunteer has agreed to come on board. Many local nonprofit directors mentioned the importance of training, and a few stressed that volunteers, like employees, should receive training appropriate to the specific duties they are assigned.

We would have to put as much training into them as we do our employees.... I know that you said you have some volunteer training, but I think that it would need to be job-specific for what we wanted them to do. (Jacksonville)

From that point, said several local nonprofit directors, regular recognition of volunteers' contributions helps keep them involved in the organization's efforts. That recognition can come at luncheons or banquets, at daylong outings, or simply in the form of a thank-you note. Whatever the forum, acknowledgement of volunteers and employees is often the standard by which volunteers and potential volunteers judge organizations. Some of the local officials in these focus groups emphasized this as a fundamental part of their activities.

What employees or volunteers are looking for is a mission that they can identify with and also recognition that they are appreciated for what they do bring. I think that if we are looking for either employees or volunteers, I think that it is important that we provide those two things—recognition, appreciation, and a mission that they can identify with, and a vehicle for them to use their skills in a meaningful way. (Jacksonville)

IMPLICATIONS

The findings of the focus-group phase of the research lead to several important implications for the RespectAbility Initiative as it proceeds:

- The strategies planned for the Initiative appear appropriate and consistent with its goals. Local skepticism about the potential involvement of large numbers of Baby Boomers and about the need to install new practices to recruit them calls for clear evidence that innovations can be successful. In this regard, the plan to disseminate success stories appears crucial. Indeed, other elements of the Initiative, particularly the documentary video and the work of the veteran journalists, can underscore the effectiveness of new ways to involve older Americans in nonprofits' activities.
- National organizations could establish nonprofit forums to show the applicability of existing models to the aging of America. For example, the National Council on the Aging has a real opportunity to spread the innovations produced by nonprofits' efforts to recruit and serve larger numbers of diverse ethnic groups. Showing how these advancements might help nonprofits create, manage, and extend new roles for older paid staff and volunteers would provide evidence of success to local and national nonprofit officials who might otherwise find it difficult to develop new strategies to recruit older Americans as staff or employees.
- Volunteers and staff of nonprofit organizations can be a cadre of messengers who transmit a compelling story to a variety of audiences—donors, volunteers, employees, civic and corporate partners, service recipients, and the public at large. Institutionalizing ways for them to communicate their positive perceptions can help organizations recruit new volunteers and employees of any age and attract other forms of support. In other words, nonprofit groups might consider training their volunteers and staff members in marketing communications to extend their fundraising and volunteer-recruitment capabilities.

- The Internet will probably not solve the problem of recruiting volunteers, no matter what age group is targeted, unless there is a concerted effort to raise awareness of the value and effectiveness of volunteerism. Although several local directors pointed to the Internet as a way to publicize their volunteer and employment opportunities, potential volunteers and staff need to know where to look on the Web—and what to look for—if Internet strategies are to produce meaningful results.
- The Web survey component of this research is an opportunity to provide a deeper understanding of the ways in which volunteers are used. The focus-group findings suggest that volunteers are generally seen exercising the functions of direct service, rather than assisting in professional roles. It will be interesting to see if any of the broader audience that responds to the Web survey has conceived or implemented practices to involve volunteers in professional roles, such as strategic planning, program development, information technology, finance, and budget.
- The Web survey should also reveal the level of interest in improving recruitment and retention of older and workers. Based on these focus groups, most local nonprofit directors and executive directors do not appear to see a widespread need to change strategies and tactics for attracting older volunteers and workers. Many seem resigned to their current practices, but this point of view may not be universal, as the Web survey could show.