RESEARCH REPORT
A Perfect Match?
How Nonprofits Are Tapping into the Boomer Talent Pool
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A Perfect Match?
How Nonprofits Are Tapping into the Boomer Talent Pool

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by Jill Casner-Lotto

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*The Generations Incorporated case study was written by Diane Piktialis.
Introduction

Nonprofit employers that have hired experienced workers or retirees from for-profit and government positions find that these people bring passion plus critical functional expertise and business skills to their organizations. The workers themselves find both a sense of mission and work that is personally fulfilling. Nonprofits that use boomer talent say they have gained tremendously, but they need to understand how to effectively recruit and manage that talent. And experienced workers who switch to the nonprofit sector can do challenging and meaningful work there – after adjusting to significant changes. This report, based on survey and case study research, provides actionable advice for both groups. Nine case studies demonstrate the business case for attracting and retaining mature workers, as well as replicable strategies and practices for nonprofits.

To be sure, the current recession has hit nonprofits hard—many are faced with the dual challenges of increased demand for services and a steep drop in funding, forcing them to cut their budgets and eliminate staff and programs. However, past experience has shown that the nonprofit sector has withstood recessions reasonably well; nonprofits are heavily represented in health care and education, two of the few sectors of the economy that are adding rather than shedding jobs, according to the Bureau of Labor Statistics. At the same time, according to an October 2008 AARP study, 65 percent of those over the age of 45 plan to delay retirement if the economic situation doesn’t improve. Furthermore, the MetLife Foundation/Civic Ventures Encore Careers Survey found many adults ages 44 to 70 already in encore or social purpose careers, and many more interested. And in the parallel MetLife/Civic Ventures Nonprofit Employers Survey, more than half of the 427 nonprofits cited the benefits of hiring encore workers, and more than 40 percent saw recruiting and hiring talent as a top human resource concern.

At a time when the demand for social services is peaking, nonprofits will need boomer talent more than ever. And boomers interested in working longer will find in nonprofits a way to use their generation’s talent and energy.

This report addresses issues important to both nonprofit employers and the boomers who may want to work for them:

- Successful transitions of workers into the nonprofit sector
- Pathways to nonprofit jobs: from volunteer to paid, through intermediaries or connectors, and through corporate programs
- Flexible work models that benefit both employees and employers
- Effective human resources management that features talent management strategies and new models of volunteerism

1 Colette Thayer, “Retirement Security or Insecurity? The Experience of Workers Aged 45 and Older,” AARP, October 2009, p. i.
Tapping into the Boomer Talent Pool: What Nonprofit Employers Need to Know and Do

If you want to hire boomers, look to your volunteers and board members, past and present. For the most part, nonprofits and boomer sector switchers said they connect through informal channels. More than half of employers surveyed said they rely on word of mouth, informal networking, with 52 percent indicating this as a very effective resource. About one-third said they find recruiting volunteers and former board members is a very effective way to attract potential sector switchers.

In fact, boomer volunteers were already filling critical roles at these nonprofits: 95 percent of employers said they engage adults age 50 and older as board members and in other volunteer roles (88 percent). About half of employers surveyed engage these experienced adults in leadership, direct services, and support roles, while 40 percent place boomers in volunteer roles that make use of their professional skills.

Brand the organization as a place where people can learn and grow. The image nonprofits project to the outside world is important and can play a key role in sector switchers’ attraction to nonprofit jobs. Most job seekers—almost 80 percent—said they rely on the web as a major tool in their job search. And both boomer sector switchers and job seekers say they are looking for more fulfillment and new challenges from work. If nonprofits want to attract boomer talent, they need to brand themselves as attractive places to work.

Chart 1
Word of mouth, informal networking, and volunteers/board members are some of the most effective resources used to recruit sector-switchers age 50+.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Somewhat effective</th>
<th>Very effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word-of-mouth, informal networking</td>
<td>39.1%</td>
<td>52.2%</td>
</tr>
<tr>
<td>Recruited volunteers and former board members</td>
<td>47.3%</td>
<td>30.9%</td>
</tr>
<tr>
<td>Posting on our organization’s website</td>
<td>48.2%</td>
<td>19.6%</td>
</tr>
<tr>
<td>Community networks or programs</td>
<td>40.0%</td>
<td>26.0%</td>
</tr>
<tr>
<td>Professional organizations</td>
<td>53.8%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Partnered with university or community college</td>
<td>43.1%</td>
<td>19.6%</td>
</tr>
<tr>
<td>Posting on online job-career websites</td>
<td>42.6%</td>
<td>18.5%</td>
</tr>
<tr>
<td>Recruited former consultants or contract workers</td>
<td>45.5%</td>
<td>13.6%</td>
</tr>
<tr>
<td>Local newspaper advertisements</td>
<td>35.7%</td>
<td>23.2%</td>
</tr>
<tr>
<td>Collaborated with other non-profits</td>
<td>31.0%</td>
<td>26.2%</td>
</tr>
<tr>
<td>Non-profit publications</td>
<td>34.0%</td>
<td>22.0%</td>
</tr>
<tr>
<td>Retiree networks</td>
<td>31.1%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Alumni associations, networks or publications</td>
<td>28.6%</td>
<td>14.3%</td>
</tr>
<tr>
<td>Search firms or employment agencies</td>
<td>25.5%</td>
<td>17.0%</td>
</tr>
<tr>
<td>Disseminated marketing materials in the community</td>
<td>30.8%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Corporate sponsored volunteer programs</td>
<td>20.0%</td>
<td>12.5%</td>
</tr>
<tr>
<td>Job fairs</td>
<td>25.0%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Outplacement programs</td>
<td>15.4%</td>
<td>12.8%</td>
</tr>
<tr>
<td>National media advertisements</td>
<td>9.5%</td>
<td>11.9%</td>
</tr>
<tr>
<td>Intermediary or third-party organization</td>
<td>7.7%</td>
<td>12.8%</td>
</tr>
</tbody>
</table>
The American Heart Association’s employment branding initiative is part of a multigenerational recruitment approach, but has special appeal to mature workers looking to make a career change. The AHA has tapped into experienced sector switchers’ desire to give back and work in careers that offer challenge and opportunities for professional growth. A redesigned careers website updates AHA’s look and feel, and its marketing materials communicate a dual emphasis on its mission and on making the organization “a compelling place to work.”

The website invites job seekers to explore various career options and view career profiles of current AHA employees. The branding initiative is not just about image—it’s backed up by substance. The AHA’s recently launched American Heart University is a key pillar of its professional development program.

Offer flexibility and health benefits to make up for lower nonprofit pay. Meeting pay expectations of those transitioning from higher income jobs is the number one challenge for nonprofits, regardless of size, type, or revenue. Half of the employer respondents said they strongly agree this is problematic. However, when asked about the effectiveness of certain recruitment practices in attracting experienced workers from outside the nonprofit sector, 50 percent of respondents cited offering flexible work schedules as the most effective practice, and more than 40 percent cited offering health insurance as very effective. Offering tailored benefits to fit individual needs was close behind, noted by almost 40 percent of respondents.

Case study results confirm the appeal of flexibility and the necessity for health insurance. Senior leaders at JEVS Human Services noted that ex-corporate executives, while attracted to the organizational mission and the notion of finding more meaningful work, were “stunned” by the salary differences between their corporate jobs and nonprofit jobs. Nonetheless, in focus groups held at JEVS and Alpert Jewish Family and Children’s Services (AJFCS), sector switchers age 50 and older expressed their willingness to accept pay cuts, but often cited flexible work schedules and a good benefit package, particularly health benefits, as making up for lower pay.

Flexible schedules are used by nonprofits of varying sizes, ranging from the smallest (Generations Incorporated (GI), with 14 employees and a $2 million budget) to the largest (American Heart Association, with 3,500 employees and revenues over $600 million).

A tailored benefit approach that considers the needs of different employee groups—such as those in second careers—and leverages those differences, can be particularly relevant in the current economy for nonprofits competing against richer compensation packages offered by for-profit companies. Several case study organizations are exploring or now offer tailored benefits, differentiating benefits to appeal to mature workers and younger workers, as well as full-time and part-time workers. At GI, monthly public transportation passes are a key benefit—both for experienced cluster managers, who work part-time, and for younger AmeriCorps members, who volunteer full-time and receive a modest stipend.

Seek out individuals who combine passion with pragmatism. Employer survey respondents were asked to rate the importance of 12 qualities that contribute to successful transitions. Overwhelmingly, the top-rated very important quality was passion for organizational mission and core values, with nearly 70 percent of employer respondents citing this. Close behind, almost two-thirds reported ability to operate in a resource-constrained environment as very important.

Clearly, individuals seeking to cross over from the private to the nonprofit sector may be seeking greater meaning

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from their work, but they must be prepared to cope with fewer resources—a reality of life in most nonprofits. One employer respondent noted how nonprofits “work to understand the business culture that experienced workers come from and what adjustments will be needed. This avoids false expectations, delusions of grandeur, and their potential growing frustration over little things and little perks they had in the for-profit world.”

**But don’t expect that passion to develop overnight.** As important as passion is, nonprofits shouldn’t expect immediate understanding of the nonprofit’s mission or core values. Nor should they dismiss a job candidate who doesn’t exhibit that passion in an interview or even in the early stages of the job. Getting used to the nonprofit culture, and acquiring a genuine understanding of the organization’s mission, can take anywhere from six months to a year, based on the experiences of two case study organizations, JEVS Human Services and Alpert Jewish Family and Children’s Services (AJFCS).

**Provide training to encourage employee flexibility and growth.** Flexibility works both ways. Employer respondents are offering flexible work schedules as a way to attract and successfully transition boomer sector switchers, but they expect flexibility on the individual’s part in return, and they provide training to support that flexibility and employees’ continuous learning and growth. Over half of employers cited flexibility to take on multiple roles as a very important quality of successful boomer sector switchers.

Several boomer sector switchers at JEVS noted the importance of both flexibility and opportunities for personal growth as factors that attracted them. The company takes this into account by designing jobs that match sector switchers’ skills with job responsibilities and also offer room for growth. The Community Council of Greater Dallas’ cross-training practices have facilitated transfers within the organization. They have also enabled mature workers to recreate their roles and be especially resourceful in starting new programs and learning new tasks. In several cases, AJFCS employees split their full-time jobs between two major part-time roles, an arrangement which has led to even greater job satisfaction among mature workers. Opportunities for both formal and informal training play a major role in AJFCS mature workers’ commitment and loyalty to the organization—both those who had transitioned from for-profit jobs and those whose careers had always been in the nonprofit sector.

**Focus on transferable business skills and best practices.** Pay attention to job design. Job design is a key factor in successful transitions, but it’s a challenge. Almost three-quarters of employer respondents said

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**Chart 3**

**Individual qualities for successful transitions: Passion for the mission and ability to work with fewer resources top the list as “very important” qualities.**

<table>
<thead>
<tr>
<th>Quality</th>
<th>Somewhat important</th>
<th>Very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passion for the mission and core values</td>
<td>24.4%</td>
<td>69.2%</td>
</tr>
<tr>
<td>Ability to operate in resource-constrained environment</td>
<td>28.9</td>
<td>64.5</td>
</tr>
<tr>
<td>Ability to adapt business or government experience and skills</td>
<td>42.3</td>
<td>50.0</td>
</tr>
<tr>
<td>Flexibility to take on multiple roles</td>
<td>36.8</td>
<td>55.3</td>
</tr>
<tr>
<td>Desire for new work challenges</td>
<td>41.6</td>
<td>48.1</td>
</tr>
<tr>
<td>Ability to function effectively in a multigenerational workplace</td>
<td>39.5</td>
<td>48.7</td>
</tr>
<tr>
<td>Understanding of how non-profits operate</td>
<td>35.1</td>
<td>51.9</td>
</tr>
<tr>
<td>Ability to apply business or government best practices</td>
<td>42.9</td>
<td>35.1</td>
</tr>
<tr>
<td>Interest in solving a societal problem</td>
<td>43.4</td>
<td>32.9</td>
</tr>
<tr>
<td>Ability to function in a consensus-driven environment</td>
<td>32.9</td>
<td>42.1</td>
</tr>
<tr>
<td>Fundraising abilities</td>
<td>36.0</td>
<td>16.0</td>
</tr>
<tr>
<td>Non-profit volunteer or board experience</td>
<td>32.0</td>
<td>12.0</td>
</tr>
</tbody>
</table>
providing job responsibilities commensurate with individual’s skills and experiences is very important to a successful transition. And almost 40 percent said they strongly agree that a major challenge in managing transitions is designing jobs that best utilize experienced workers.

While in some cases the transferability of skills is clear-cut, in other instances, it may not be so obvious. Making it work takes imagination and vision, as executives and sector switchers at JEVS Human Services and AJFCS discovered. In both cases, experienced corporate executives, both coming from a sales background, were able to successfully adapt their business expertise to a new field: managing programs to help people with disabilities.

Provide orientation processes to acclimate newly hired boomers to the nonprofit culture. Managing the cultural differences between for-profits and nonprofit is no easy task for nonprofits. More than 40 percent of employer respondents said they strongly agree that creating realistic expectations during the hiring process and assimilating into the nonprofit organizational culture are major challenges. Again, the findings applied across the board, regardless of organizational size, type of nonprofit, or amount of revenues.

Orientation sessions can help. Almost two out of three employer respondents said the provision of new hire orientation or on-boarding processes was a very important organizational step leading to successful transitions:

“You have to have a set course of events for the transitioning. Most boomers have come from a very structured routine and coming into the nonprofit sector is almost a 180-degree turn.”

“They must understand how a nonprofit works and see firsthand how the mission of the organization is done ‘hands-on.’ For instance, give them the opportunity to experience as many phases as possible of a program’s daily activities. Example: deliver mobile meals to the elderly with volunteers.”

As part of its services to nonprofits and individuals, ReServe Eldercare, Inc. runs “pre-start work orientation” sessions. The sessions address a range of issues on transitions into a nonprofit culture and offer suggestions for managing them.

Pay special attention to senior leadership transitions. A third of respondents strongly agree that managing senior leadership transitions is a major challenge. At a Research Working Group meeting, members discussed some key challenges for executives transitioning into

**Chart 4**

Matching skills with responsibilities, providing orientation processes, and providing multigenerational environments are the three most important organizational practices to support successful transitions.

<table>
<thead>
<tr>
<th>Practice</th>
<th>Somewhat Important</th>
<th>Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide job responsibilities commensurate with individual’s skills and experiences</td>
<td>23.7%</td>
<td>73.7%</td>
</tr>
<tr>
<td>Provide new hire orientation or on-boarding processes</td>
<td>30.7%</td>
<td>62.7%</td>
</tr>
<tr>
<td>Provide an environment that is very inclusive of all generations</td>
<td>32.0%</td>
<td>61.3%</td>
</tr>
<tr>
<td>Provide timely feedback to new hires</td>
<td>38.7%</td>
<td>53.3%</td>
</tr>
<tr>
<td>Offer training/continuous learning opportunities</td>
<td>42.7%</td>
<td>44.0%</td>
</tr>
<tr>
<td>Allow flexible work schedules</td>
<td>39.5%</td>
<td>44.7%</td>
</tr>
<tr>
<td>Provide opportunities to interview with other staff members prior to hiring</td>
<td>39.7%</td>
<td>38.4%</td>
</tr>
<tr>
<td>Encourage multigenerational teams</td>
<td>32.0%</td>
<td>32.0%</td>
</tr>
</tbody>
</table>
nonprofits, including doing more with fewer resources, dealing with multiple stakeholders, and strengthening their abilities to learn and manage consensus.

At JEVS Human Services, consensus building can be a major challenge for sector switchers transitioning into executive positions. With an increased emphasis on group processes and collaboration, decisions often take longer, a reality that can frustrate former business executives used to fast-paced corporate environments. The company has responded by examining some of its processes to see how some decision making can be expedited. Nonprofits should also consider providing workshops in consensus building for executives, as well as employees at other levels of the organization.

Make sure your board and top leadership play a role in transitioning new boomer employees. When asked if the nonprofit organization offered them any assistance in transitioning to their new nonprofits, almost half of the sector switcher respondents (48 percent) indicated they did receive help. Supportive boards and CEOs allocated training resources and fostered a sense of professionalism, and CEOs became effective mentors. Examples:

“Our board affords me with both a clear definition of its expectations and a great amount of latitude...there are strong statements of performance, directives on professional ethics, and a clear code of conduct...I am given the ability to execute the mission with a wide latitude of professional judgment.”

“Close working relationship with executive director in my first nonprofit position—she did a good job of ‘mentoring’ without minimizing my experience and skills.”

Nonprofit executives can take a proactive role in lessening the culture shock for sector switchers. At JEVS Human Services, executives examine the organization’s recruitment tools and job descriptions to make sure the language is less “nonprofit speak” and more inclusive. “We hope to be a welcoming place so the new staff realize they can be significant contributors early on,” said Marian Baldini, chief operating officer.

Chart 5
Meeting pay expectations and dealing with cultural differences are major challenges in managing transitions into the nonprofit sector.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Somewhat agree (%)</th>
<th>Strongly agree (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating realistic expectations during the hiring process</td>
<td>44.2</td>
<td>44.2</td>
</tr>
<tr>
<td>Assimilating into the nonprofit organizational culture</td>
<td>39.5</td>
<td>43.4</td>
</tr>
<tr>
<td>Managing senior leadership transitions</td>
<td>50.0</td>
<td>32.9</td>
</tr>
<tr>
<td>Meeting pay expectations of those transitioning</td>
<td>30.8</td>
<td>50.0</td>
</tr>
<tr>
<td>Designing jobs that best utilize experienced workers</td>
<td>39.7</td>
<td>37.2</td>
</tr>
<tr>
<td>Managing increased health insurance or other benefits</td>
<td>31.6</td>
<td>31.6</td>
</tr>
<tr>
<td>Finding opportunities for professional development</td>
<td>41.6</td>
<td>20.8</td>
</tr>
<tr>
<td>Designing part-time senior leadership roles</td>
<td>43.4</td>
<td>17.1</td>
</tr>
<tr>
<td>Building multigenerational trust and teamwork</td>
<td>35.5</td>
<td>22.4</td>
</tr>
<tr>
<td>Accommodating part-time or flexible work schedules</td>
<td>28.2</td>
<td>29.5</td>
</tr>
<tr>
<td>Designing benefits relevant to this stage of life</td>
<td>28.6</td>
<td>26.0</td>
</tr>
<tr>
<td>Providing mentoring opportunities for younger workers</td>
<td>39.0</td>
<td>11.7</td>
</tr>
<tr>
<td>Dealing with age-related stereotypes</td>
<td>32.9</td>
<td>17.1</td>
</tr>
</tbody>
</table>
Professionalize volunteerism to make the best use of boomer skills. Clearly, volunteering can be an effective way for hopeful sector switchers to beef up their nonprofit experience. While nonprofits have not traditionally allocated resources to design volunteer opportunities that match boomers’ skills, there are organizations to help nonprofits and experienced boomers connect. VolunteerMatch.org serves as an online clearinghouse matching volunteers’ skills with openings at nonprofits. It also partners with corporations that fund volunteer engagement programs for their current and retired employees and offers online training webinars on engagement of skilled volunteers, including boomers. Its recently published handbook offers guidelines, tools, and exercises to help nonprofits engage boomer volunteers and develop a new skilled volunteer engagement model.\(^5\)

While employer respondents agree that volunteering is an effective recruitment technique, only 12 percent cited volunteer or board experience as a very important factor contributing to successful transitions; 32 percent viewed it as somewhat important. It may be that because volunteering or board experience is not necessarily an entry point into their organizations, nonprofit employers don’t see it as a critical factor in successful transition. This suggests that unless volunteering is structured to facilitate transition to a paid position—if indeed that is the goal of the individual and the organization—the volunteering experience may represent a lost opportunity for both.

AJFCS’ Enhanced Companion program provides group training, stipends, professional support, and flexible hours to participating volunteer retirees who provide care and companionship to frail, elderly adults. After a two-year volunteer stint, these retirees are prepared to step into paid companion work roles.

Nonprofits that have taken a strategic approach to managing their volunteers are reaping the benefits. March of Dimes has reinvigorated volunteerism with its launch of the Volunteer Leadership Institute, which is strengthening the recruitment and retention of volunteers. The Institute provides both online and face-to-face training and development of its volunteer leaders, with the initial focus on approximately 3,000 local chapter and division board members and a pilot program that reaches grassroots volunteers. As the volunteer corps grows from the grassroots, March of Dimes expects new leaders will emerge to strengthen chapter committees and boards.

Create environments that encourage multigenerational participation and teamwork. While some nonprofit employers pointed to intergenerational challenges in managing transitions, they were stronger in their agreement on the important role multigenerational environments play in successful transitions. Employers noted two very important steps that contribute to successful transitions: providing an environment very inclusive of all generations (61 percent) and encouraging multigenerational teams (32 percent). In addition, they “strongly agree” on the major benefits that experienced boomer sector switchers bring:

- Expertise in needed organizational functions (63 percent)
- Business skills and perspective to the nonprofit setting (58 percent)
- Life experience (46 percent)

At Generations Incorporated, younger generations and mature adults work together on teams that also include a mix of full-time and part-time salaried workers and volunteers. While it has been a challenge to coordinate the schedules of the various volunteers and staff, the benefits of this flexible multigenerational work environment are clear compensation.

Listen to your sector switchers. Experienced boomers who have already transitioned successfully into their nonprofit positions can help the organization recruit and absorb new boomers. JEVS is tapping the knowledge of its sector switchers—former white-collar corporate executives as well as blue-collar construction employees—through a pilot boomer task force. The task force identifies high-need skills and jobs in the organization that would be easy for sector switchers to fill, recommends recruitment resources and opportunities, and discovers new challenges—and products—to maximize boomer talent. For example, one division is designing a sector switcher tool kit to help job seekers understand how to identify transferable skills and best market themselves to nonprofits.

The task force is also helping JEVS respond to the need for career counseling and outplacement services for those who have lost their jobs—and possibly to realize an opportunity in the numbers of highly qualified workers looking to nonprofit work during the current downturn.

The Growing Role of Connectors: Linking Boomer Talent to Nonprofits

Intermediary firms, or connectors, play an increasingly important role in linking experienced adults with nonprofit jobs. Connectors can help nonprofits recruit, screen, and place experienced workers and retirees in nonprofit jobs. And they offer useful information, tips, strategies, and blogs for boomers seeking nonprofit jobs.

Civic Ventures (www.civicventures.org) is a connector, think tank, and program incubator. It provides resources to the nonprofit sector for recruiting older workers and provides connections, news, and services for adults establishing encore careers that combine personal meaning, financial security, and social contribution through www.encore.org. Three major programs include: Breakthrough Awards, which recognize nonprofits and public-sector agencies that are expanding job opportunities for baby boomers; The Purpose Prize, the first significant investment in social entrepreneurs and innovators over age 60; and Experience Corps®, which engages Americans over age 55 as tutors and mentors in under-resourced public schools.

ReServe Elder Service, Inc. (www.reserveinc.org) is based in New York City and works closely with nonprofits and job seekers to assure a good fit, and places mature adults and retirees in stipend-paying, part-time jobs. About 60 percent of its placements involve clients switching from for-profit to nonprofit positions. (See case study on page 21.)

Bridgestar (www.bridgestar.org) was launched in 2003 as an initiative of The Bridgespan Group (www.bridgespan.org), and provides a variety of career- and recruiting-related services, content, and tools designed to help nonprofits build strong leadership teams and individuals pursue career paths as nonprofit leaders. Through Bridgestar’s alliance with boardnetUSA, nonprofit organizations can post board opportunities and individuals can be connected to positions of interest. These services are complemented by the Bridgespan Group’s executive search capability, which includes full search and a la carte advisory services for nonprofits.

One of the online learning centers, Bridging to the Nonprofit Sector, provides ideas and tools for business professionals interested in nonprofit positions (bridgers), and for nonprofit organizations interested in hiring bridgers for key functional roles. For individuals there are sample bridger resumes, profiles of bridgers, job postings, advice for first-time nonprofit job seekers, volunteer-to-work paths, and nonprofit job search resources. For organizations there are interviewing guides, reference guides to assess a bridger candidate’s transferable experience and qualities, and examples of nonprofits that have hired bridgers in executive roles.

Idealist.org, the website of Action Without Borders, provides online tools to help potential sector switchers and nonprofits. For job seekers, there is The Idealist Guide to Nonprofit Careers for Sector Switchers (www.idealist.org/sectorswitcher), a career development guide for experienced professionals seeking nonprofit work and for career development professionals interested in helping their constituents make the transition. And for nonprofits, there is the online Nonprofit Human Resource Center (www.idealist.org/hrp/index.html). Its recently developed Mid-Career Transitions Program (MCTP) (www.idealist.org/mctp) includes an array of online resources and on-the-ground events to support job seekers and the career development professionals who counsel them. In addition, MCTP has partnered with Civic Ventures’ Next Chapter initiative to pilot workshops that provide career development tools and strategies.

HR Dynamics, Inc., (HRD) (www.hr-dynamics.com) an affiliated human resource consulting corporation of FEGS Health and Human Services System (www.fegs.org), serves the HR management needs of nonprofits that do not have extensive HR functions. It has increasingly focused on the recruitment and placement of mature workers from government and for-profit positions seeking nonprofit jobs. FEGS employment, career, and workforce division also provides career assistance to boomers and has partnered with AARP to administer AARP’s Worksearch tool in one of the first Worksearch Centers, located in New York City.
Actionable Advice for Potential Nonprofit Employees

Switching to the Nonprofit Sector: What Boomers Need to Know and Do

Become familiar with nonprofits. Network, volunteer, get on the board. How did the sector switcher survey respondents find their jobs? Overwhelmingly, they networked and volunteered at nonprofit organizations, including becoming board members. Almost two-thirds said word-of-mouth, informal networking was very effective, while more than 40 percent cited their volunteering or board experience as a very effective way of finding their current nonprofit position. While some sector switchers found positions at nonprofits where they had been long-time volunteers, others contacted nonprofits for volunteer work.

A substantial percentage of respondents said they found several other resources somewhat or very effective in landing their nonprofit positions. For example, almost half said a community program or agency was somewhat (37 percent) or very (11 percent) effective, while about 40 percent said they found the following resources to be somewhat or very effective, including:

- Consulting experience (41 percent)
- Alumni/professional association, network, or publication (41 percent)
- Local newspaper advertisement (40 percent)
- Nonprofit employer website (39 percent)
- Online job/career website (37 percent)
- Networking session (35 percent)

Adapt for-profit skills to fit nonprofit roles and culture. Be prepared to learn. What made the difference in boomers’ successful transition to a nonprofit position? Like employers, these sector switchers said it was their ability to adapt business skills and best practices. The two most critical factors for successful transitions cited are focusing on functional skills that are transferable (63 percent) and transferring best practices in functional areas to nonprofit settings (61 percent). That’s not always an easy road to follow. As the personal experiences of sector switchers at AJFCS and JEVS Human Services illustrate, learning new skills and learning how to apply old skills in new ways can be tricky. Here’s how one former corporate executive who came from the fast-paced hotel sales business to start a new community-based program at AJFCS, described the learning process:

“In the hospitality business, I had to organize and sell various services to our clients, so that transfers well. For me, the challenges have been trying to explore what skills transfer best in different situations, how much do I apply those skills, how assertive do I get in using those skills. In the profit world, you do what you have to do to reach those goals. You’re paid to be extremely aggressive and push your agenda. I have to understand how to be different in a nonprofit setting to be truly effective. It’s not about getting something for ‘me’ anymore. It’s about getting something for my client, and that’s a big difference.”

AJFCS Associate Executive Director Jenni Frumer said the executive’s business expertise was instrumental to the successful launch of the program to help aging parents of adult disabled children:

“It would take someone else a year to do that—it took him three months. He knew nothing about disabilities—but that was the knowledge base he could acquire. He was learning a lot about clinical skills—which is what he wants to do as a social worker. But what I couldn’t have taught someone was the skill of how to pull this whole project off—knowing how to establish contacts in the community, and understanding how to get groups of people with different agendas to work together for a common goal. He’s done a fabulous job.”

At JEVS Human Services, Gary Lachow, formerly in pharmaceutical sales, is now a job development manager, overseeing a program to help people with disabilities find work. Lachow’s sales background was perfect for the position, since the job development unit was shifting its approach from a social services emphasis to a sales and marketing one. Lachow said he is appreciated for his sales and communications expertise and the business perspective he brings, but is continuously learning new skills and knowledge in the field of disabilities, mental health diagnoses, and different funding sources:

“I bring a totally different mindset. I leave meetings and get complimented for providing a perspective that focuses on both the bottom line and of course the interests of our clients. There’s a lot of learning and continues to be every day. It can be frustrating at times. If you
initially show the ability to comprehend something—then you get thrown new questions. And people are surprised when I don’t immediately know the answers. They want data for quarterly reports, and I don’t even understand the question yet.”

Joseph Cipolla, JEVS Director of Corporate Employer Services, noted that people from for-profits come with an understanding and skills that can generate revenue based on customer satisfaction. “We’re setting real metrics, and we need those customer relationship skills.”

**Moderate your expectations. Be willing to accept tradeoffs.** Clearly, sector switchers experienced varying forms of culture shock when moving to nonprofit jobs. While overall they were less intense in expressing transition challenges than employers, the number one challenge, according to nearly 70 percent, is operating in an environment with fewer resources, with 17 percent citing this as very challenging and half as somewhat challenging.

Those sector switchers who have been successful in their new positions accepted certain trade-offs. For example, Lachow took a significant cut in salary and benefits, but in return, he gets to work in what he considers to be a much more collegial atmosphere than in his previous corporate job and is able to appreciate the outcomes of his work.

“At my prior job, I was working on projects where I was very far from the end user—the consumer who was using the medication, while at JEVS, I’m working directly with people with disabilities and helping them get jobs and change their lives. It’s definitely rewarding.”

Others are jolted by the slower pace in nonprofits and necessity to build consensus as a way to move agendas forward. This was particularly frustrating for Deborah Mahnken, executive director of JEVS Home Care, a new unit which operates as a social enterprise.

“My unit, Home Care, was a small forgotten piece of a larger JEVS unit, Support for Independents. So we plucked this small division out and made it a separate start-up. This is a social enterprise. So while we function in an organization that is nonprofit, we operate more like a for-profit. The frustrations have been tremendous. The biggest difference that I notice is this laid back attitude: ‘no need to rush anything—it’ll get done.’ When you’re out there trying to grow and making money—everything has to be done yesterday! Also, it appears there are many

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**Chart 6**

Number one challenge in moving to a nonprofit position: Operating in an environment with fewer resources is cited by nearly 70 percent of sector switchers age 50+.

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Somewhat Challenging</th>
<th>Very Challenging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating in an environment with fewer resources</td>
<td>50.0%</td>
<td>16.7%</td>
</tr>
<tr>
<td>Dealing with resistance to change</td>
<td>38.3</td>
<td>15.0</td>
</tr>
<tr>
<td>Working in an environment emphasizing intangible measures of success and performance</td>
<td>36.2</td>
<td>12.1</td>
</tr>
<tr>
<td>Working with multiple stakeholders</td>
<td>32.2</td>
<td>11.9</td>
</tr>
<tr>
<td>Less authority to make decisions</td>
<td>30.0</td>
<td>11.7</td>
</tr>
<tr>
<td>Working in an environment emphasizing consensus decision making</td>
<td>16.9</td>
<td>22.0</td>
</tr>
<tr>
<td>Modifying my management style</td>
<td>35.0</td>
<td>3.3</td>
</tr>
<tr>
<td>Dealing with increased public and media scrutiny of non-profits</td>
<td>24.6</td>
<td>7.0</td>
</tr>
<tr>
<td>Dealing with perceived notions/stereotypes about my motivations and ability to contribute to a mission-driven organization</td>
<td>25.0</td>
<td>3.3</td>
</tr>
<tr>
<td>Transferring skills/experience from a for-profit or government position to a non-profit position</td>
<td>22.0</td>
<td>5.1</td>
</tr>
<tr>
<td>Working with volunteers</td>
<td>26.3</td>
<td></td>
</tr>
<tr>
<td>Dealing with perceived notions/stereotypes about my age</td>
<td>10.0</td>
<td>3.3</td>
</tr>
</tbody>
</table>
cooks in the kitchen. Everybody has a say in what’s going on in any division they care to. You have to go through many layers to get things approved, to get things done. The designing and printing of Home Care marketing materials took many, many months. In a for-profit, you can’t afford for this to happen.”

Mahnken added that the situation has improved greatly, which she attributes to the forward-thinking approach of chief operations officer Marian Baldini.

Know that the benefits of working in nonprofits outweigh the challenges. In general, sector switchers were much more emphatic in expressing the benefits of transitioning into nonprofit jobs than in voicing challenges. An overwhelming majority (77 percent) said they strongly agree that doing meaningful work with a social purpose is a major benefit. Other major benefits they strongly agree on: seeing a positive impact from my work (68 percent) and applying my professional skills and experience in a nonprofit setting (63 percent).

But don’t expect less stress. Less than one-fifth said they strongly agree that working in a less stressful environment has been a major benefit, while 14 percent somewhat agree with this statement. (A caveat: the majority of sector switchers in this sample had transitioned to social services and health-care related organizations, which may be associated with more stressful working environments than a more mixed group of nonprofits.)

“The work is more stressful because of the ‘passion’ people feel about their involvement,” said one sector switcher. “There is more work to be done with fewer people so the balance between personal and professional is almost impossible. The training is nonexistent.”

Sector switchers in leadership roles were more likely to cite difficult challenges in the transition than those in less senior positions, which may also be a factor in the amount of stress experienced. On the other hand, those who chose to downshift from management to front-line roles were much less likely to cite dealing with resistance to change as a challenge, with 25 percent saying this was very or somewhat challenging for them when they moved to nonprofit jobs, compared to 86 percent in management roles. Those who chose to stay in management roles experienced greater challenges in other ways as well, as illustrated in Chart 7. This finding also supports nonprofit employers’ views about the special challenges of senior leadership transitions.

Chart 7
Intensity of challenges is less when sector switchers age 50+ move from management to front-line roles.

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Stayed in management roles</th>
<th>Moved to front-line roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealing with resistance to change</td>
<td>25.0%</td>
<td>86.2%</td>
</tr>
<tr>
<td>Working with multiple stakeholders</td>
<td>30.0</td>
<td>55.2</td>
</tr>
<tr>
<td>Working in an environment emphasizing consensus decision making</td>
<td>35.0</td>
<td>55.2</td>
</tr>
<tr>
<td>Transferring skills/experience from a for-profit or government position to a non-profit position</td>
<td>15.0</td>
<td>37.9</td>
</tr>
</tbody>
</table>

Percent reporting that the variable was very or somewhat challenging
### What are boomer job seekers looking for? And what do they need to find it?

#### What job seekers experience

- Like sector switchers, job seekers age 50 and older are looking for more fulfillment (76 percent) and new challenges (61 percent) from work.
- Overwhelmingly, job seekers use the web (78 percent) as a tool to prepare for a job search, as opposed to formal programs. Almost half (49 percent) volunteered or served on a board.
- The two most difficult factors in the job search: matching skills and experience (66 percent) and finding an organization to help (59 percent).
- The two most difficult factors in the interview process: age-related stereotyping (58 percent) and age discrimination (51 percent).

#### What they need

- Job seekers need help. Despite their reliance on the web, many indicate a need for more face-to-face assistance and counseling in the job search and interview process.
- When interviewing, nonprofits should understand what questions not to ask according to Age Discrimination in Employment Act regulations and avoid making age-based assumptions. Focus on boomers’ transferable skills and experiences, accomplishments that match the nonprofit needs, and qualities that indicate a good fit in the organization’s culture.
- Connectors are an underused resource. Only 25 percent had used an intermediary or third-party organization; 28 percent had used a search firm or employment agency.

#### What they say

**The frustrations:**

“Nonprofits don’t seem to understand the benefits of hiring someone with experience in another field. It just seems easier to hire a twenty-something with no experience.”

“It is beginning to appear that the nonprofit is not as open to career changes as I had expected. It appears that age discrimination and a resistance to change or someone with a different background is just as pervasive in nonprofit as for-profit.”

**The motivations:**

“For-profit work has been so cutthroat and competitive with no consideration for anything but making money. I know nonprofit work has financial realities as well, but hopefully success can be measured by something other than salary and profits.”

“Economic necessity and the desire to continue working to, hopefully . . . do some good in this world.”
Case Studies

The case studies that follow make evident how mature workers are bringing their talents to nonprofits, filling critical leadership and front-line roles, mentoring younger employees, and contributing knowledge and experience. The cases:

- demonstrate the business case for mature workers, and for linking the issues of mature workers to strategic goals and mission with established metrics.

- show how nonprofits are as committed to their employees’ professional development as they are to their social mission.

- present replicable strategies and practices for smaller local and larger national groups.

- illustrate how flexible work arrangements and emphasis on professional development are attractive to employees of all ages.
JEVS Human Services

At a glance:

Location: Philadelphia, Pennsylvania

Mission: To benefit members of the community by enhancing their employability and self-sufficiency through a broad range of support programs

Size: 923 full-time, 79 part-time employees; 35 percent of workforce is age 50 and older; $82 million budget

Workforce strategy: To recruit talented mature workers, including baby boomers, from the for-profit world

Outcomes: Increase in the number of boomer sector switchers filling critical leadership and front-line roles in high-growth units, and launch of a new Pilot Boomer Task Force to boost recruitment and market new sector switcher products

Attracting White-Collar and Blue-Collar Boomers

JEVS Human Services, a nonprofit, nonsectarian organization headquartered in Philadelphia, runs more than 20 successful programs providing skills development, job readiness and career services, vocational rehabilitation, recovery services, adult and residential day services, and in-home personal assistance. It was voted one of the “Top 50 Large Employers in Pennsylvania” by a number of community and business organizations in 2008.

Philadelphia is also home to a number of major pharmaceutical and financial corporations. Over the past three or four years, JEVS has been getting cold calls and walk-ins from ex-corporate executives and managers weary of their work environments and looking to the nonprofit field for something new and different. Calls have come from people who have opted for early retirement and are now looking for something to do or from people who have been laid off in corporate restructuring. More recently, due to the economic downturn, inquiries are predominantly from those who have been laid off. Many who had been considering retirement are now, for the most part, staying in their jobs.

JEVS’ decision to tap into the for-profit talent pool was accidental, said Diane Posternack, vice president of human resources. “I would like to say this was a conscious, positive decision on our part, but it just happened. People were being outplaced or downsized from the corporations, and because of their age were having a hard time getting back in. Their fallback was nonprofits and they came to us, though it did require a major salary adjustment.”

A similar situation was developing at the Orleans Technical Institute, JEVS’ nonprofit vocational and court reporting school, which prepares students for various occupations, including the building trades. There, former electricians, carpenters, plumbers, and mechanics, retired from private-sector jobs, were finding meaning and gratification in new work teaching these skills.

Thus JEVS was attracting boomer sector switchers not just from the corporate world, but from the construction trades as well. Today, JEVS is tapping the knowledge of these workers and converting it into new sector switcher products that it intends to market—in an attempt to actively recruit boomers from all walks of life and help the organization grow.

Background

JEVS is one of the largest nonprofits in the Delaware Valley. It serves nearly 17,000 people each year, focusing on those with physical, developmental, and emotional challenges, and those facing adverse socio-economic conditions, including unemployment and underemployment. Founded as Jewish Employment and Vocational Service in 1941 to help Jewish refugees from war-torn Europe find employment in the Philadelphia area, its focus is now on serving the greater good, though Jewish community initiatives continue to be critical to its mission.
JEVS defines itself as a mature organization, a “concern for us—it’s not where we want to be,” Posternack said. To boost its growth and generate revenues, JEVS has developed a number of social enterprise units, such as the Orleans Technical Institute and Vocational Research Institute, that are run along business lines, but where any profits are returned to the organization’s mission rather than shareholders. In that respect, “we’re not a typical nonprofit,” said Marian Baldini, chief operating officer. But, in fact, it may be one reason experienced workers, burned out by the corporate treadmill or tired of the often grueling physical labor involved in construction jobs, find that JEVS blends the best of the for-profit and nonprofit worlds.

**Linking Workforce and Business Strategy**

Baldini thinks of herself as having a “for-profit” mentality. “It’s just my personality.” Though her previous experience was in the nonprofit sector, most of her work involved turnarounds—restoring strength and vitality to poorly performing units of nonprofit organizations. “This is how I was developed as a leader,” she said.

“Our primary competitive strategy—if you look at this in the context of the balanced scorecard—is customer intimacy,” she said. “By staying close to customer needs and preferences in our nonprofit, mission-focused units, we identify social enterprises opportunity. Social enterprises are business units built on our knowledge with the goal of generating retained earnings.” Baldini believes that income from social enterprise units will help advance the nonprofit mission. JEVS is using its knowledge of service delivery to create and sustain these units.

“The problem is that in some of our units, there are not enough leaders to fill critical positions. And it’s disabling to the departments if we can’t stabilize the leadership. We need to find people with good leadership skills, first, then we can teach them about our business,” she said.

To actively recruit boomers from the for-profit talent pool—and tap the knowledge of those who have made the transition to JEVS—the Home, Health and Work division recently launched a Pilot Boomer Task Force to look at: positions and functions JEVS should target for recruitment, where to look for potential sector switchers, and which for-profit skills are most transferable to a nonprofit setting.

**Recruiting Sector Switchers: Lessons Learned**

Baldini and Posternack have witnessed firsthand the steady stream of applicants to JEVS from the for-profit sector in the past several years. Here they summarize some key observations and lessons learned:

**Benefits can be beneficial** Most sector switchers were stunned by the difference in wages between the for-profit and nonprofit worlds. For those who were financially well-off, salary differences weren’t as critical. But offering good benefits can make a difference, according to Posternack. “What we cannot give in salaries we try to make up in other ways,” she said, citing JEVS’ health insurance plan, which has no payroll deductions for employee premiums and a variety of choices for employees; a 403(b) retirement plan with an employer contribution, whether or not the employee contributes, and leave policies that include four weeks of vacation, two personal days, and 17 sick days a year.

**Understanding of mission is gradual** In interviews, applicants rarely had a meaningful understanding of the JEVS mission. But, that’s okay, said Baldini. “Understanding the mission is a process. At first, they really don’t know what you’re talking about when you talk about mission. As a manager, you have to look at the other skills they bring. They can always learn the business or mission, but they have to bring the skills first.”

**Listen for stories that apply to nonprofits** One JEVS applicant from the insurance industry didn’t know anything about the business drivers for success in nonprofits, so while he could tell stories about what he could do in the for-profit world, none would benefit JEVS. “He had experience in mergers and acquisitions, but that wouldn’t help us here,” said Baldini. “We have 35 revenue sources; 20 of them run on revenue cycles, and the others are restricted grants. But if he doesn’t understand the revenue cycle, he wouldn’t ask the right questions. Plus, he hadn’t done any homework to prepare for the interview.”

Another applicant who had both nonprofit and for-profit experience fared better.

**Focus on transferability of skills** JEVS is looking at positions to fill where skills are most transferable and are in greatest demand, such as in its huge payroll and finance departments. “What are the implications of that if we as an employer were intentionally going to increase the number of people who would cross over?” Baldini
A Perfect Match? How Nonprofits Are Tapping into the Boomer Talent Pool

The Conference Board

asked. “One thing to look for is how I as an executive can help this person make a transition. We are looking at our tools for recruitment and job descriptions which can be in ‘nonprofit speak.’ So we are making sure our language is inclusive. We also hope to be a welcoming place so the new staff realize they can be significant contributors early on.”

Understanding of culture is gradual

New workers should not expect a smooth transition—at least in the first six months. “Personalities are different in the nonprofit world,” said Posternack, who came to JEVS from a for-profit. “It took me six months to get accustomed to the way people thought, to the way people behave in a nonprofit. I thought I would go stark raving mad! Just understanding differences in managing time, and how decisions are made.” She offered three pieces of advice to sector switchers: ask questions, be patient, and calm down. “Our time clock is different. The time that it takes to get things done and resolved is much longer, because there is much more group process. Decision making is stretched out.”

There are no hard and fast rules

Sector switchers may have difficulty figuring out, for instance, who has to approve things. JEVS is somewhat unique, noted Baldini, in that sometimes the answer is, ‘You can just do it,’ while in other cases it has to be approved by three people. “There are no hard, fast rules. There isn’t any book or manual you can read, and some rules are evolutionary,” she said. “What we are hearing is that there are fewer written processes and that creates ambiguity, which can slow down the perception of effectiveness.”

You will be making tradeoffs

People crossing over to the nonprofit world may find certain business functions very different. Example: fiscal planning. “Two people who came from private companies were used to having budgets handed down to them without choices,” said Baldini. “Here they actually have more freedom, but with more freedom comes more responsibility.” Another tradeoff: In a nonprofit, one may have a lot more latitude and space to be creative, for example, in planning a marketing campaign. But nonprofits traditionally don’t have big marketing or public relations departments to provide materials and produce campaigns, as in private companies, which means individuals must do more themselves. Some of these tradeoffs may not be clear until a person has been on the job for a while.

“You can have a big impact in a nonprofit, but you’re all by yourself. And people may like that on some days—on other days, not so much,” Baldini said.

Recruiting Sector Switchers and Beyond: Findings from the Boomer Task Force

The Pilot Boomer Task Force has identified employment opportunities that JEVS should be targeting to recruit boomers, discovered high-need jobs that would be potentially easy for sector switchers to fill, and made recommendations on where to look for suitable candidates. In addition, the Vocational Research Institute plans to design a tool kit to help job seekers interested in crossing over to the nonprofit sector. Baldini hopes these kits will help potential applicants understand that while “you can’t be anybody but who you are, you don’t necessarily have to do what you did.”

Challenges Ahead

With more than one third of its workers age 50 and over and about a quarter over 60, a critical challenge ahead for JEVS is succession planning. According to Baldini, management is beginning to see requests for creative “wind-down” plans rather than firm exit dates. JEVS is also working on the development of a more comprehensive and effective system to engage and support volunteers, particularly highly skilled boomer volunteers.

In addition, the Boomer Task Force has identified specific challenges as JEVS moves to recruit sector switchers:

- How to effectively use sector switchers who bring needed skills but lack specific certification and credentialing, and who don’t want to go back to school.
- How to bring in mature workers seeking paid and volunteer paraprofessional roles. What flexible benefits—transportation passes, for instance—can attract this group?
- What are some new models of work—job sharing, flextime, and project-based work—for those seeking paid and volunteer roles?
- How to effectively use boomers coming into less skilled positions that don’t require much training.
- How to face the need for career counseling and outplacement services for those who have been laid off from their corporate jobs.
Future Products

The Pilot Boomer Task Force believes there’s a market for its sector switcher tool kit. It is exploring ways to link this product with JEVS’ other internal recruitment and orientation tools and eventually sell it to corporations that could offer it to boomers on the cusp of retirement. The goal is to create a new social enterprise unit at JEVS, Customized Workforce Solutions, based on the task force’s findings. So the pilot’s initial purpose—recruiting sector switchers—has now branched into other areas as well. “We consider this just one more example of baby boomer talent and ingenuity,” said Baldini.

Finding new meaning in work: the views of building trades instructors

The Orleans Technical Institute, a nonprofit career school run by JEVS Human Services since 1974, provides job-related training and job-search assistance for adults interested in building trades, court reporting, or human services careers. Students come from all walks of life to learn new skills to enhance their chances of success in a competitive job market.

The building trades program prepares graduates for entry-level employment in air conditioning, refrigeration and heating, building maintenance, carpentry, plumbing, and residential and commercial electricity. Many of the building trades instructors are boomers who were formerly employed as carpenters, plumbers, electricians, and other building maintenance careers and are now teaching students to find new careers in the building trades and improve their lives.

For building trades instructors, the chance to apply their job skills in a new way has meant finding new meaning in their work.

“If I were doing this job strictly for the pay, I wouldn’t be doing it. I was making twice as much working as an electrician. I have 35 years experience. There are two things I like about this job: Number one, I’m not doing physical work anymore… My body’s a bit beat up. But the big thing is, it’s a nonprofit, we’re helping people. And that’s what I like, helping the students—so that they can get a job and support themselves and their families—that’s a good feeling.”

Bruce Strycharski, Residential and Commercial Electricity

“It’s a passion for us. We also all get along, we’re like a family.”

Yvette Lopez DeVictoria, Building Maintenance

“We enjoy sharing our knowledge with others, sharing experiences, showing hands-on skills and combining theory with the hands-on—that’s a good feeling, showing students they can accomplish this.”

Linda Dunphy, Building Maintenance

“Students range in age from 18 to 56, but the bulk of students are young—in their 20s. But some are older—60 years old, who lost a job through foreign imports, or changed jobs, or come here for retraining. The best classes are those that mix older and younger students. They interact at lunch, and the older students calm the younger ones down. Older students ground the younger ones. It makes our job easier.”

Jerome Henry, Carpentry

“What make us different from the average teacher? We’ve been in the trades for years. It took us years to learn our secrets. We’re not just teaching them tasks, we’re sharing our secrets.”

Bill Markelwith, Building Maintenance

Contact Information:
Marian Baldini
Chief Operating Officer
JEVS Human Services
1845 Walnut St., 7th Fl.
Philadelphia, PA 19103
marian.baldini@jevs.org
www.jevs.org
ReServe Elder Service, Inc.

Connecting Experienced Retirees to Critical Nonprofit and Public Service Roles

ReServe Elder Service, Inc. connects experienced workers and retirees, age 55 and older, with nonprofit and public sector organizations. ReServists’ skills and experience fill critical capacity-building and direct-service roles, and accomplish work that otherwise would not have been done in the agencies that use them—all at well below market prices. For ReServists, the work is not only personally and professionally fulfilling; it is a direct response to their needs for part-time flexible schedules. ReServists work, on average, 10 to 20 hours a week, with an initial stint of six months that can be renewed if both parties agree.

ReServists are paid a stipend of $10 per hour—a feature that encourages the ReServist and partner organization to take the placement more seriously. In a 2007 ReServe survey, three out of five ReServists said the stipend was an important supplement to their income, and several indicated the supplement provided validation to their work. While ReServe’s total operations are funded by foundation, corporate, and individual grants and donations, the partner organizations have been so pleased with ReServists that almost all pay for the stipends themselves—ReServe rarely has to raise that money.

Background

With initial funding from the Open Society Institute and the Blue Ridge Foundation, ReServe launched its program at nine pilot workplaces in 2005. The organization was co-founded by Jack Rosenthal, president of The New York Times Company Foundation, and Herb Sturz, a board member of the Open Society Institute and The After-School Corporation. They both identified the need for post-retirement opportunities to allow experienced adults to volunteer while contributing their skills to New York City nonprofit and public service agencies.

ReServe has consistently increased its number of placements; since October 2005, it has placed nearly 550 ReServists (of more than 1,350 applicants) in more than 175 nonprofit and city agencies. At first, ReServe attracted qualified retirees by building relationships with professional associations, unions, colleges and graduate schools, large corporations, local senior centers and residences, and community service and volunteer programs. It also reached out to interested nonprofit and public institutions to develop placement opportunities.

Today, ReServe continues to expand its network of individual organizations, but it is also forging new types of partnerships that involve multiple placements of ReServists with nonprofit “umbrella organizations” and government agencies—a move it hopes will greatly accelerate the number of placements. In addition, ReServe recently expanded its staff and enhanced its website to further extend its reach.

ReServe Elder Service, Inc.

At a glance:

Location: New York, New York

Mission: To connect experienced mature adults and retirees with stipended, part-time jobs that use their lifetime skills to respond to critical needs at nonprofit and public organizations in New York City

Size: 14 employees (eight full-time, two part-time employees, and four ReServists)

Workforce strategy: To place mature adults in direct services and infrastructure positions using online tools and a personal, customized approach

Outcomes: Since 2005, 550 placements of skilled mature adults in more than 175 nonprofit and public agencies in New York City

ReServe Elder Service, Inc.

At a glance:

Location: New York, New York

Mission: To connect experienced mature adults and retirees with stipended, part-time jobs that use their lifetime skills to respond to critical needs at nonprofit and public organizations in New York City

Size: 14 employees (eight full-time, two part-time employees, and four ReServists)

Workforce strategy: To place mature adults in direct services and infrastructure positions using online tools and a personal, customized approach

Outcomes: Since 2005, 550 placements of skilled mature adults in more than 175 nonprofit and public agencies in New York City
Organization

With its online Opportunity Board, launched in April 2008, ReServe can reach many more individuals and host organizations while maintaining a personal, customized approach that assures high-quality placements.

Once an individual submits an online application, the information is reviewed by ReServe’s staff and entered into its database. A program officer contacts the applicant and conducts a telephone interview to review his or her interests and qualifications. ReServe concentrates its placement efforts on two critical staffing needs for nonprofits: direct services and infrastructure positions, such as information technology, human resources, marketing, fundraising, administration, and finances. After the initial screening and interview, applicants can log on to the opportunity board and notify staff if they see a position that interests them. The program officer also searches for a potential match. If one is found, the candidate is interviewed by a ReServe staff member.

All ReServists are screened before they reach the partner organization. All information is reviewed by staff members and entered into ReServe’s database of job openings. A ReServe program officer acts as the organization’s personal contact. Once organizations apply, they can post their job descriptions free of charge. And they can log on to the board to review resumes and short bios, written by ReServe staff, of candidates.

“We work with the partner organizations to provide a meaningful and precise job description outlining their needs and expectations—which is not always an easy thing for them to do,” said Claire Haaga Altman, ReServe’s Executive Director from 2006 until 2008.

In addition, ReServe significantly reduces nonprofits’ administrative burden by taking over the payroll function. ReServe has created a nonprofit paymaster service to manage the payroll for ReServists working at nonprofit and public agencies. Agencies are billed $14 an hour, with $10 going to the ReServist’s stipend (which is taxable), $2 toward fringe benefits (FICA, unemployment insurance, workers’ compensation, disability), $1 to the payroll agency, and $1 to ReServe.

Orientation Sessions

Orientation sessions for ReServists are an important feature of the placement process. The usual procedure is to conduct an orientation after the individual and partner organization reach an agreement to start work. But ReServe may move up this “pre-start work orientation” so it occurs right after the individual submits an application. “First, we wanted to give people a clear sense of the nonprofit culture, of what they are getting into, early on in the process,” said Altman. “We also found that if people were submitting applications, having initial interviews, and then not getting placed for a month, it was too frustrating.”

Group orientation sessions are “where they get the lowdown on the process,” said Altman. “We talk about how we’re trying to make a good match, but that it also helps if they regularly check the opportunity board. We give them tips on how to prepare for an interview . . . We also discuss the payment process.”

The orientation sessions address a range of issues concerning the transition from a corporate to a nonprofit culture and from full-time to part-time roles. ReServe estimates that about 60 percent of its placements are of people switching from for-profit to nonprofit positions. “We tell them they may be moving to more rudimentary workplaces. For example, they may do their own xeroxing, and have to do their own support work. And it may seem that managers take a longer time to make decisions,” said Altman. While ReServists fill critical professional roles, a challenge for some, Altman said, is making the switch from “setting direction,” which they may have done in their full-time primary careers, to “taking direction” in their new part-time roles. Often it is direction from a younger, full-time staffer.

Managing the Placement Process

ReServe’s site coordinator contacts the ReServist and the partner organization within the first two weeks of placement and offers ongoing assistance or troubleshooting for the ReServist and the host agency. “We stay in touch with people, and ask them to stay in touch with us as well, particularly if there are any problems,” said Altman. “For example, if the manager is just too busy to give any feedback to the ReServist, we want to know. If ReServists aren’t fully engaged in these positions, they’re not going to stick around.” After five months, ReServe checks on the placement to see if people want to “re-up” for a second six-month stint.
What ReServists Do

ReServists function in support roles that meet many social needs: intergenerational needs of children and teens to interact with older adults; elder-to-elder services; community justice initiatives; and professional services for nonprofit and public organizations. ReServists come from a variety of income levels and backgrounds, including law, human resources, teaching, social work, accounting, and information technology. They fill a variety of direct service roles, from tutoring adults and youths to critical capacity-building roles in marketing, information technology, fundraising, human resources, administration, and finance. Some examples:

- A former banker and two retired social workers served as investment adviser and case managers for the Vera Institute’s court-appointed Guardianship Project for incapacitated individuals.

- A retired public relations and marketing manager is creating a communications campaign to promote the work of The Transitions Network, a networking organization for women over 50.

- Four retired professionals from fields that include law, marketing, and business consulting are lending their expertise in the start-up of the new Lawrence N. Field Center for Entrepreneurship of the City University of New York’s Baruch College. Among their tasks: researching potential board members and developing board roles and responsibilities; developing curriculum and workshops for small businesses to gain minority certification; creating marketing materials; and creating a student alumni program.

What ReServe Host Organizations Say

At Baruch College’s entrepreneurship center, ReServists are described as “awesome” and “amazing.” According to Monica Dean, the center’s administrative director, “We’re ecstatic. We’ve gotten where we’ve gotten because of the resources of the ReServists.”

A former counsel for a large utility company is running the volunteer program, under the supervision of a case manager, for United Neighbors of East Midtown, Inc. The organization was selected by the AARP Foundation to administer one of its pilot money management programs, which provides bill-paying assistance to frail, low-income elderly. Another ReServist, a former vice president at JP Morgan Chase Bank, researched new sources of funding. Executive Director Joan Mintz said that these projects would have “either been postponed or never addressed.” In addition, she points to bottom-line savings: to pay a social worker to administer the volunteer program would cost about $30,000, while the stipend for the ReServist is about $7,000 a year.

ReServe recently surveyed ReServists and host organizations about their experiences and found similar results: meaningful work—work that would not have otherwise been done—is being accomplished. Additionally, organizations cite the benefits of age diversity in their workplaces, pointing out that having multiple perspectives makes a difference, and they welcome experienced adults as informal mentors.

Challenges Ahead

“Placing retirees is not an easy sell in the nonprofit sector. Some nonprofits are resistant to using part-time people; too often they don’t want to make accommodations,” said Altman. And most nonprofits are stretched so thin they don’t have time to figure out how they can creatively use the skills of part-time experienced adults. Altman refers to this as nonprofits’ “blind spot.” “All nonprofits need help. But they need to take the time to focus on where and how. They have to come up with a meaningful job description.” ReServe helps nonprofits with this assessment process, but it must be a shared responsibility.

While the lack of computer skills among retirees seeking to re-enter the workforce was a problem when ReServe first started in 2005, Altman believes this is less of a challenge today. “We’ve seen that people leaving their primary jobs, particularly the younger boomers, tend to be more computer literate.”

Strategies for Growth

ReServe will continue to seek partnerships with nonprofit organizations and make them aware of the benefits that experienced adults working part-time can provide. It is also extending its reach by publicizing results, making presentations to nonprofits, and promoting its work at national conferences and association meetings. But Altman believes it will take even more to accelerate the use of ReServists in nonprofit organizations.
One element that has been missing in ReServe’s work with New York City nonprofits, particularly in contrast to its relationship with New York City public agencies, is the support of leaders or champions who can advocate for its cause. “In New York City, Mayor Bloomberg has been a strong advocate of having ‘age-friendly’ agencies to better serve the public, just as he has promoted ‘green friendly’ agencies,” said Altman. “We’ve had the Commissioner of the New York City Department for the Aging, Edwin Mendez Santiago, who really spearheaded ReServists working with New York City agencies, and an assistant commissioner, who has reached out to various city agencies and acted as an advocate for us. They’ve pushed the notion that mature workers have great people skills and can relate well to the general public. That has really made a difference.”

ReServe’s contract with New York City authorizes city agencies to use its services; each agency must approve the funds to support ReServe positions. The positive publicity has raised awareness of how the skills and experience of retirees might be used. But it is harder to identify leaders as spokespersons for the more segmented nonprofit sector. Nonetheless, ReServe is reaching out to major nonprofit member associations, such as United Way of New York, UJA-Federation of New York, and the United Neighborhood Houses, that can contact their member agencies and sell ReServe’s services.

ReServe is also expanding its services by making multiple placements within single organizations. It:

- has placed more than 20 retirees with The After-School Corporation (TASC) in Brooklyn and the Bronx
- plans to place 40 ReServists with AARP Foundation’s Money Management Program, which augments nonprofit organizations’ capacity to provide bill-paying assistance to low-income elderly

Most recently, ReServe has developed a pilot Health Navigator program in two New York City hospitals, designed to connect ReServists with elderly adults to keep them from being readmitted to hospitals. ReServists help them navigate entitlements, make follow-up clinic visits, procure medications, and secure home care when needed. ReServe has created a five-day training program for ReServists who then work as health navigators, each assigned three clients.

“So far, the program is working the way we predicted,” said Altman. “The navigators are from varied backgrounds such as banking, press relations, pharmaceutical sales, and social work. They enjoy the personal one-on-one contact and feel as if they are actually accomplishing something.” ReServe recently expanded the health navigator program with the Health and Hospitals Corporation, which runs all city-owned hospitals. As part of a newly launched diabetics program, HHC is using five navigators to reach out to older diabetics to help them keep their diabetes in check.

Potential for Replication

ReServe has received a grant from Atlantic Philanthropies to develop a business plan for national replicability. While it is too early to make predictions, ReServe thinks its model can be replicated across the nation. For example, the health navigator program, if applied nationwide, could have enormous impact, Altman said. According to a 2007 report to Congress,6 Medicare spends $15 billion a year on readmissions within 30 days of patients’ discharge. “If that amount were reduced by 20 percent, it could save $3 billion nationally. ReServists, providing that kind of service to the elderly, are a bargain, compared to the costs of them staying in a hospital. We believe it is the hands-on services provided to the elderly that makes the difference.”

ReServe will continue to develop these types of demonstration projects. It plans to share its expertise with interested groups in other cities, providing them with the tools and operational models it has developed.

Contact Information:
Susan MacEachron
Deputy Director
ReServe Elder Service, Inc.
6 E. 39th St.
New York, N.Y. 10016
smaceachron@reserveinc.org
www.reserveinc.org

6 Report to the Congress: Promoting Greater Efficiency in Medicare, Medicare Payment Advisory Commission, June 2007, p. 103.
Enhanced Companion
An AmeriCorps Program of Alpert Jewish Family and Children’s Service

At a glance:

Location: West Palm Beach, Florida

Mission: To serve the Jewish community primarily but not exclusively and fulfill its obligation of “tikkun olam” (repairing the world) by providing a wide range of social services to individuals and families.

Size: One full-time and two part-time employees manage the Enhanced Companion program, which includes about 20 AmeriCorps volunteers and 30 paid employees. The total program budget is $312,000, with about $170,000 of it going to the AmeriCorps volunteer component.

Workforce strategy: To match volunteer retirees, generally age 55 and over, with frail, elderly adults for companionship and to assist caregivers through respite care. After a two-year commitment of service as AmeriCorps members, volunteers can then move into paid work roles as part of AJFCS’s regular “senior-to-senior” Enhanced Companion program.

Outcomes: 150 AmeriCorps volunteers trained, 415 elderly clients served, 35 volunteers moved into paid work roles. Other results: improved quality of life and community involvement of volunteer retirees. Longer-term community impacts: those who volunteer stay involved in multiple volunteer activities beyond the life of the program.

Making the Volunteer-to-Work Transition

In West Palm Beach, Florida, Pat Daniels, a retired teachers’ assistant, volunteers 15 hours a week with four elderly clients, taking them to doctors’ appointments, grocery shopping, exercise classes, or an outing to a mall. “Or sometimes it’s just taking a walk and talking with them—it’s making a big difference in their lives, and it just makes my day!”

Sally Fabrizio, a retired medical technician who is also a volunteer, has seen a marked difference in one of her clients. On the first day Fabrizio visited her, the client bluntly told her, “I don’t want you here.” Now, said Fabrizio, “she’s come out of her depression. As soon as I walk in, she’s a different person.”

These two women have made a two-year commitment to serve as enhanced companions to the elderly as part of an AmeriCorps-funded program run by the Alpert Jewish Family and Children’s Service, a nonsectarian social services agency in West Palm Beach. The program provides them with extensive training and a monthly stipend of $211, plus mileage. After completing the program, they will become paid employees as part of AJFCS’s regular Enhanced Companion program.

Both women have money saved, and Fabrizio has a spouse who is still working. Their decision to join this program is based, they say, not on financial need, but on the desire to continue to help their clients, earn a little extra money, and keep themselves busy and connected to the workplace.

Background

The Enhanced Companion program started in the early 1990s with seed money from IBM. AJFCS recruited, trained, and matched IBM volunteer retirees with other corporate retirees who needed assistance to maintain their independence. It became a fee-for-service program in 1992. At that point, AJFCS classified its volunteers as employees and paid them for their services.

In 2002, AJFCS became a part of the University of Maryland’s Center on Aging demonstration project, called the U.S. Legacy Corps for Health and Independent Living.

7 The Center on Aging is now part of the recently created Department of Health Services Administration in University of Maryland’s School of Public Health.
Living. The Legacy Corps model expands the youth service concepts of the AmeriCorps program to an older population. The Legacy Corps initiative is designed to attract baby boomers as volunteers by emphasizing lifelong learning, meaningful civic engagement activities, and the opportunity for building new networks and social capital.

“We were actually up and running with this model before being funded by AmeriCorps through the University of Maryland,” said AJFCS associate executive director Jenni Frumer. “We were fortunate to become a part of the demonstration project because our Enhanced Companion program was a good fit with the Legacy Corps model and it enabled us to significantly expand our program.”

Thus enhanced companions include both AmeriCorps members receiving the living allowance made possible through the AmeriCorps grant and those hired and paid directly by AJFCS as employees. AmeriCorps refers to participants in its funded program as “members,” but AJFCS refers to them as “volunteers” (although they are defined by AJFCS human resource policies and the agency’s liability insurance carrier as employees).

At a recent AmeriCorps national conference, the AJFCS Enhanced Companion program was praised for its sustainability, not only because it incorporates the Legacy Corps mission, but also because it provides a path to paid work beyond the volunteer stipend service.

“We call our program ‘life after AmeriCorps,’ and we’re finding that many of our volunteers are indeed moving on to become paid enhanced companions to the elderly as part of the regular employee program,” said Nancy Frent, AJFCS AmeriCorps volunteer coordinator. Some will continue with the same clients they are seeing as volunteers—an advantage since many elderly adults become attached to their companions and vice versa.

As a pathway to work, AJFCS’s program has built-in advantages. To date, 29 enhanced companion volunteers, after serving their two-year terms as AmeriCorps members, have moved into AJFCS’s regular Enhanced Companion program as paid employees, while six have transitioned into other related roles as paid employees.

For example, one enhanced companion volunteer was hired as an activities assistant at the AJFCS host site where he was also volunteering as an AmeriCorps member. Another was hired by AJFCS as a volunteer coordinator. Some have continued on as Enhanced Companion volunteers, while others become volunteers in related roles in their communities. And others have become private companions to seniors in their communities. Whatever choice they make, noted Frent, they are better qualified and prepared for their next role after having completed AmeriCorps’ two-year training program.

Fulfilling a Vital Community Service

Florida has the highest percentage of elders (17.6 percent) in the nation and the second highest number of elders (2.8 million), after California. With the aging population in Palm Beach County expected to grow significantly, enhanced companion volunteers and employees are fulfilling a vital community service by assisting caregivers through respite care. “We find that both senior volunteers and employees are bringing a very special perspective because of their backgrounds and life experiences,” said Frumer. “They may have been caregivers themselves and are often familiar with elderly adults’ needs. They connect very well with our clients.”

The two-year AmeriCorps program, which provides about 20 volunteer slots each year, has funneled 150 of its volunteers into AJFCS’s regular Enhanced Companion program since 2002. Those 150 volunteers have provided service to about 415 elderly clients.

The program is cost-effective, said Frumer, because AmeriCorps funding helps support both administrative costs of the volunteer program and overall program expenses. The AmeriCorps grant has allowed AJFCS to reduce the fees for its services, regardless of which type of companion—volunteer or paid—provides the service. “The fit was very good for us, because we already had the staffing and infrastructure in place,” she said. “And the fact that AmeriCorps members transition helps, too. We don’t have the expense of constant recruiting and hiring, which is time consuming and very expensive.”

8 Karen Harlow-Rosentraub, Laura Wilson, and Jack Steele, Volunteering, Lifelong Learning, and Community Cohesion: An Evaluation Model of a National Demonstration Project, University of Maryland, 2006.

Recruitment and Staffing

Enhanced companions, volunteer and paid, range in age from 59 to 81. Primarily retirees from the northeast, companions include business executives, teachers, nurses, homemakers, and engineers. AJPCS has successfully recruited volunteers and employees through: local newspaper ads, presentations in gated communities, synagogues, and civic clubs; fliers, and word of mouth.10

Both programs are staffed by the same full-time professional program director, a part-time professional volunteer coordinator, and a part-time professional case manager. The program director works on the initial training of enhanced companions to assure a good match with the elder client. The part-time case manager conducts quarterly assessments to monitor the client’s progress and supervise enhanced companions. The volunteer coordinator recruits, interviews, screens, and coordinates training for the AmeriCorps members.11

Key Features of a Volunteer-to-Work Pathway

The two-year volunteering program replicates several of the key features that have made the regular Enhanced Companion program a success: careful assessment to assure a good client-companion match, flexible hours, initial and ongoing group training sessions, rigorous screening of candidates, ongoing evaluation, and professional support and supervision. In addition, the AmeriCorps program provides participants with educational vouchers as a lifelong-learning incentive—a feature not included in the regular Enhanced Companion program.

Matching Companions with Clients

“This is not an on-call system, it’s a long-term program,” said Frent. “Volunteers commit to the program for two years and see the same client or clients each week. Elderly clients have some very specific needs, and we are very careful in matching companions to meet those client needs. . . . It’s like fitting the pieces of a puzzle together.”

“The program is distinguishable because of the care taken in making that initial match,” Frumer emphasized. “It’s not just a ‘body’ to be with the client—and definitely not like a home health agency that you can call and be sent someone immediately who performs certain tasks, but might not have the same focus on a social model like ours.”

Flexible Hours

Enhanced companion volunteers and employees work various part-time schedules. Employees work between four and 20 hours a week. Those in the AmeriCorps program are required to work at least nine hours a week. However, they can “bank” their hours and make them up in case of illness or time off. For example, Sally Fabrizio, who sees two clients a week, has banked her hours, working 15 hours a week, in order to take a month off in the summer.

But before taking off, Fabrizio will have a fellow volunteer accompany her when she visits one of her more challenging clients so the client can get used to the new companion. “You can’t take them out of their comfort zone,” Fabrizio said. “In the several months I’ve worked with this client, I’ve seen such progress.”

Group Training

Training is critical to both the volunteer and the regular Enhanced Companion program. The initial training for volunteers is done annually and includes at least 36 hours of classroom time over six days. The training session includes about 20 volunteers. Training for both volunteers and paid enhanced companions groups emphasises practical skills and knowledge about the agency’s mission and professional practice.

All enhanced companions—volunteer and paid—meet monthly in smaller groups to discuss client issues and talk about problems. Volunteers and paid companions meet separately. According to Frumer, group training, including interactive techniques such as role playing, has been particularly effective: “The group makes it a more meaningful experience . . . People come from multiple places in their lives and they’re all being trained to perform the same function.”


11 Ibid., p. 82.
Participants also receive training in CPR, first-aid techniques, and other emergency procedures, as well as dealing with wheelchairs, walkers, and mobility. Guest speakers talk about Alzheimer’s, aging, and caregiving issues. The monthly sessions build camaraderie among enhanced companions, which reflects a basic principle of the Legacy Corps initiative to provide new social networks to replace those diminished through retirement. Many participants become friendly and get together on their own time.

**Rigorous Screening**

The volunteer program screens applicants as rigorously as the paid program. The screening process includes fingerprinting, drug testing, a doctor’s report, and a full background check. Ten percent of applicants are screened out due to legal infractions or poor driving records. Another 15 percent choose not to apply due to the stringent screening process.12

“Risk management issues are substantial,” Frumer said, “Enhanced companions are driving and providing in-home service to other older adults, and have significant confidential information on their clients.” Other risk prevention measures include annual TB screening, driver’s license checks twice a year, and written performance evaluations every six months. “There is a significant commitment of human resources to this program. We could not be doing this without a strong HR department,” said Frumer.

**Ongoing Evaluation**

AJFCS’s performance and quality improvement (PQI) process involves regular collection and evaluation of data to measure impact on client services. AJFCS produces quarterly and six-month reports plus caregiver and client surveys to track clients’ progress. Frent also writes regular success stories in a monthly newsletter to illustrate best practices. The Legacy Corps evaluation model also provides ongoing feedback concerning enhanced companions’ civic engagement attitudes and levels of community attachment.13

**Professional Support and Supervision**

The enhanced companion program director and case manager are professional social workers and are available on a 24-hour basis, so companions have direct access to them and can call with any problems they are experiencing on the job. “For example, enhanced companions—who are often the first contact for family members—might have received a call from an out-of-state family member requesting that the enhanced companion take their mother to the doctor tomorrow. The enhanced companion will then call a social worker for direction,” explained Frumer. “Another example might be enhanced companions who are with a client who has fallen. After calling 911, which is what the enhanced companions are trained to do, they will call the social worker to report the incident and receive further support and direction.”

**Program Outcomes**

The Enhanced Companion program’s inclusion in the University of Maryland Legacy Corps project, which includes 21 other sites in nine states, has allowed the collection of data that illustrates the effectiveness of a model combining lifelong learning with the opportunity to perform meaningful roles in society. The University of Maryland is tracking all volunteer participants in the various sites at four stages: prior to training or service, during service, after their two-year term, and three to five years after participating in the program. A primary outcome measure is a “community attachment scale” comprised of five different statements about various types of commitment to—and understanding of—their communities. AJFCS’s enhanced companion volunteers show improved community attachment scores at each stage. Even after three to five years the community attachment score is still significantly higher than it was at the beginning of participation.14

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12 Ibid., p. 84.
13 Ibid., p. 88.
14 Ibid., p. 88.
Next Steps

Based on the success of the Enhanced Companion program, AJFCS is piloting another peer model program, which trains boomers to become “resource specialists” within their senior gated communities. Similar to enhanced companions, these specially trained “ambassadors,” as they are called, work under professional supervision and assist seniors and their families with issues of caregiving, bereavement, and advocacy.

AJFCS considers itself a learning organization, and will continue to explore ways to tap into the boomer talent pool. “Baby boomers represent a natural resource for us. We believe engaging them in meaningful ways to build and develop community is critical to our mission,” Frumer said. “Especially with limited and dwindling resources, this is the wave of future.”

Contact Information:
Jenni Frumer, LCSW
Associate Executive Director,
Alpert Jewish Family & Children’s Service
5841 Corporate Way, Suite 200
West Palm Beach, FL 33407
JFrumer@jfcsonline.com
IBM Transition to Teaching

At a glance:

**Location:** Headquarters in Armonk, New York

**Program mission:** To enable IBM mature workers to transition to the teaching profession in order to address the national shortage of math and science teachers

**Size:** IBM—nearly 400,000 employees and $103 billion in revenues

**Structure:** Funds for launching and running the program have been reallocated from IBM’s existing human resources budget. Similarly, no new employees were hired to manage the program. Current IBM employees involved in program administration have simply added Transition to Teaching to their usual work responsibilities.

**Workforce strategy:** To restructure existing HR benefits, such as time, financial support, and flexibility so employees can take teacher certification classes and acquire classroom experience while still working full-time

**Outcomes:**
- Currently approximately 100 employees are enrolled program participants, with 14 graduates and 12 teacher placements so far
- Affects corporate citizenship and public policy
- Strengthens employee morale, retention, and brand image

Note: This case study has been updated from an earlier version completed by Phyllis Snyder, vice president, Council for Adult Experiential Learning, as part of work for The Conference Board.

**Background**

IBM, a Fortune 100 global technology company, is not currently facing a workforce shortage. But the company is paying close attention to the talent it has today—and to finding the talent of tomorrow.

Two trends on IBM’s radar are:

- The increase in the number of mature workers who are remaining in the labor force past the typical retirement age
- The inadequate supply of math and science teachers in the U.S. who are ready to educate the next generation for technical careers

With nearly 400,000 employees worldwide, IBM is constantly positioning itself to anticipate changes before they become strategic problems. In the past decade, IBM has fundamentally reshaped its technology strategy, business processes, and culture while maintaining growth and profitability. The world of technology moves quickly, and IBM strives to meet changing market demands and employee needs by responding rapidly.

With a large group of employees born during the baby boom, IBM has been examining the impact of the demographic changes on its workforce, customers, and the economy. In the past, many employees worked for IBM for their entire careers. Today, younger employees are likely to work in a variety of companies during their careers. IBM recognizes that the combination of shorter employee tenures and an increase in incumbent retirees means that it will need to replace a high number of employees in the coming years—many of whom have specialized skills.

To address issues facing mature workers and better understand the potential impact on its business, IBM convened a series of work groups over two years. Through this research IBM executives learned that traditional notions about retirement might not apply to baby boomers. Many mature employees had no plans to stop working. Some employees did not think they could afford to retire. Many wanted to stay employed to maintain access to company health insurance. Others reported that they are physically and mentally able to work into their 60s and 70s and make professional contributions.
One trend identified through these work groups was the interest among mature workers in exploring second careers. Many, according to Maura Banta, a corporate citizenship and corporate affairs manager, talked about becoming teachers.

IBM has made a long-term investment in programs designed to encourage employees to serve as science and math mentors in schools. According to the U.S. Department of Labor, jobs requiring science, engineering and technical training are among those projected to grow the fastest and create the largest job growth through 2016. At the same time, the pipeline for the creation of new teachers is running dry, and many school districts report a shortage of science and math teachers. IBM executives anticipate that this gap could result in a future talent shortage for their own and other businesses.

In response to these trends, in 2005 IBM announced the creation of Transition to Teaching. Through Transition to Teaching IBM hoped to leverage the brains and backgrounds of some of its most experienced employees by enabling them to become fully accredited teachers in their communities.

Support from the Top

Transition to Teaching was a rapid and bold move for IBM. A blueprint for the program was designed during the summer of 2005, it was announced in September 2005, and IBM began accepting applications in November 2005. According to Stan Litow, president of the IBM International Foundation, “We were able to forge ahead quickly because the top brass was 100 percent behind it.”

Today, Transition to Teaching has 100 active participants; 14 have graduated, 12 have been placed, and two have recently received their certification and are looking for work.

Innovative Use of Existing Resources

One of IBM’s business principles is that companies can address their business problems through creative uses of their existing human, financial, and technological resources. Transition to Teaching provided an opportunity for IBM to follow its own advice and demonstrate what is possible. According to Nick Donofrio, former executive vice president for innovation and technology, “We’ve used our people and our technology tools innovatively for Transition to Teaching in much the same way that we use them to offer our services to other businesses.”

Transition to Teaching was launched and executed with no impact on the company’s budget. It is structured as a collaborative partnership between corporate citizenship and corporate affairs and human resources. At this time, IBM does not employ anyone who is exclusively devoted to managing Transition to Teaching. All of the employees involved in administering this program—across multiple departments and states—have simply added Transition to Teaching to their usual work responsibilities. The $1.5 million set aside for the pilot program was re-allocated from the existing human resources budget.

IBM approached the creation of Transition to Teaching in much the same way that it approaches its clients’ projects—as a transformation of business processes. For many years, IBM has offered tuition reimbursement and leaves of absence. When IBM decided to create Transition to Teaching, executives began to explore how they might restructure existing benefits to provide employees with the time, financial support, and flexibility they would need to take certification classes and acquire classroom experience while working full-time. According to Randy MacDonald, senior vice president of human resources, “These two HR benefits have always existed—we are just flexing them in a different direction and packaging them to address a new trend. We help other companies think outside of the box and now we are showing them how by creating programs like Transition to Teaching.”

Flexibility allows Transition to Teaching to accommodate its diverse participants, who are at different stages of their careers, have differing financial and family obligations, live in many states, and are at varied stages of transitioning to teaching. According to Banta, “Every applicant is a different entity with special circumstances. Each state has a different preparation and certification process—so each person is a unique case.”

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Requirements for employees interested in Transition to Teaching are:

- At least 10 years of employment at IBM
- B.S. in math, science, or a related field
- Demonstrated experience in education or mentoring
- A history of excellent performance reviews
- Written approval from a direct manager

The mechanics of the Transition to Teaching program have evolved since the program was first announced in September 2005. Today:

- Applicants must submit an education/training plan and timeline.
- The program must be completed within three years.
- Applicants must describe how much money and what kind of flexibility they will need to complete coursework and practical training.
- Applicants can receive up to $15K in total compensation over three years. The funds may be used for tuition reimbursement or as a living stipend during leave without pay to conduct a teaching practicum.
- IBM holds participants’ jobs and maintains their benefits during the practical training portion of the certification process.
- Applicants who complete the program have six months or until the following September to secure a teaching position (whichever period is longer). In some instances this time frame can be flexible if the timing interferes with the applicant’s ability to claim retirement benefits.
- Applicants must achieve at least a B in all courses.
- If the applicant does not complete the program or does not secure a teaching position he or she must repay the funds to IBM.

IBM is also using its technological savvy to help support and connect Transition to Teaching participants, who are spread across 17 states and often do not know one another, with a website that will provide information and support for current and future participants.

The website was launched in 2006 and continues to evolve. It offers forums for program participants to share concerns, questions, and topical articles about the challenges of teacher certification, classroom management, and working within public school system bureaucracies. Web content is intended to supplement the classroom experiences for Transition to Teaching participants by creating a virtual community with resources from the National Center for Teaching Quality. Participants can access trained, online mentors drawn from much larger pools of seasoned teachers than those typically available to clinical faculties.

**Corporate Citizenship**

Transition to Teaching has done more than create opportunities for mature workers. It has generated goodwill among employees, clients, and the larger community, which has translated into higher employee morale, higher rates of retention, and better market positioning.

IBM has a history of assisting its employees in their transition to retirement. Many employees have spent their entire careers at the company and naturally turn to IBM to help them plan their next steps. While IBM realizes that not every incumbent retiree wants to become a teacher, the Transition to Teaching program offers a unique option for those who have harbored such dreams. According to Robin Willner, vice president for global community initiatives, “Thinking about what your employees want and need is very important for IBM. It is also a recruiting and retention tool. We want our people to know that we care about their futures.”

IBM employees who run this program have received positive feedback from employees, even those who are not planning to participate. As one IBM employee said, “It’s nice to know that the company is putting its money where its mouth has been.”

Other companies and governments have approached IBM and asked for help in setting up similar programs. “IBM’s clients can see that we are using our technological tools and our existing systems to start something completely new that can make a big difference,” said Stan Litow. “This is just what other businesses want to be able to do.”
When the program was first announced there was a flurry of interest among local and state education officials who applauded the company’s efforts. School districts near IBM facilities are hopeful that this program will boost the supply of new science and math teachers—and the next generation of scientists and engineers. According to Bernice Winston, IBM’s talent program manager, “Our employees send their children to the schools where this program operates—so they win too. This is a long-term investment in the larger community.”

Public Policy
Transition to Teaching addresses mature workers’ pursuit of second careers, but it has also landed IBM in the middle of another public policy issue—the need to reform the teacher certification process to enhance the supply of top-notch educators. The crisis in math and science teaching is well documented, but traditional efforts to increase the number of new teachers have not yielded the quality and quantity of new teachers needed. IBM executives believe that programs like Transition to Teaching may offer the greatest hope for pumping more talent into the teaching market.

Others agree. In California, Governor Arnold Schwarzenegger allocated $10 million for a program that is similar to Transition to Teaching. California’s plan will pay for tuition for employees seeking second careers in teaching if they enroll at state schools. In New York, IBM has worked closely with an education roundtable to propose legislative reforms to the teacher certification process.

An Outstanding Investment
Transition to Teaching has been an outstanding investment for IBM, returning significant benefits to employees, clients and the community while enhancing the company’s market position and reputation. IBM executives hope to expand this program in the U.S. and to create similar programs through IBM offices abroad. While Transition to Teaching has required a substantial shift in thinking, it has been relatively inexpensive to create and implement. Though the program is still in its early stages, IBM considers it to be a success. IBM hopes that other businesses will consider similar initiatives and would be eager to work with them.

Transition to Teaching as a Model
To date, California is the only state in the U.S., that has adopted legislation to make such a program a reality, but 17 other states have expressed interest in this model and a few others have legislation in the works, as have a number of companies. In addition, the government of the United Kingdom has also modeled a program after Transition to Teaching with active participation by IBM executives to help develop the program. The success of Transition to Teaching has given birth to the Transition2 program, now part of an overall suite of programs called the Global Citizen’s Portfolio to address 21st century skills for employees.

Transition2 is designed to help IBMer develop second careers in fields that give back to the community, including higher education and the nonprofit and public sectors, areas experiencing large shortfalls due to retirement and overall growth. The program provides new methods and tools, career transition assistance, and technology access via an online platform. To implement these programs, IBM created public/private and civil/private partnerships with leaders in their respective areas—Bridgespan, the Partnership for Public Service, and the Chronicle for Higher Education—to help workers discover potential leadership careers in those sectors. Currently the program is available to IBM employees and retirees only, but IBM hopes to offer it to other private sector companies.

Contact Information:
Maura O. Banta
Corporate Community Relations Manager
IBM Corporation
404 Wyman Street, Waltham, MA 02454
mbanta@us.ibm.com
www.us.ibm.com
www-01.ibm.com/ibm/transitiontoteaching
Community Council of Greater Dallas

At a glance:

Location: Dallas, Texas

Mission: To serve the community by providing leadership in: determining priority issues and solutions in the health and human service arena, convening partners to significantly impact service delivery, and increasing awareness of and access to services

Size: 61 full-time, five part-time employees; 40 percent age 50 and over; $10.3 million budget

Workforce: To adjust work practices to better fit the needs of employees and the organization, strategy: through flexible hours and leave times, compressed workweeks, telecommuting and cross-training for individuals and departments

Outcomes: Greater employee satisfaction, retention, loyalty, and creativity; lower training costs and a nimble organization. Mature workers have especially high retention and low absenteeism rates, and are valued for their knowledge, experience, commitment, and ability to mentor younger employees.

A Confluence of Events Spurs Flexibility

Some flexible work practices were already in place at the Community Council of Greater Dallas (CCGD), a community-based nonprofit that collaborates with other area nonprofits to connect people to health and human services. But two events in 2002 led to an increased flexibility that has become embedded in the organization’s culture.

- Several staff members—both mature and younger workers—had assumed caregiver roles at home for aging parents or young children. In two cases a serious illness and a death in the immediate family meant individuals would need increased time off if they were to continue working. CCGD responded by offering its employees extended medical/personal leave and, in collaboration with the Dallas Area Agency on Aging (DAAA), caregiver training.

- After the 9/11 attacks, CCGD was officially designated as a first responder in disasters and emergencies, which meant that it had to create and be able to implement a disaster-recovery plan for the Greater Dallas area and beyond, and offer training in business continuity to nonprofits. To fulfill this role, the organization and its staff members had to operate flexibly, said Martha Blaine, CCGD’s executive director. “It meant we have to move quickly and be prepared as an organization to work on problems immediately. Flexibility for our employees allows us to do this.”

While CCGD’s salaries may be lower than for-profit salaries in the Dallas area, its social service mission, emphasis on flexibility and good health benefits, and an organizational culture that promotes a “people first” philosophy, have served as powerful retention tools, especially among its mature workforce. The average tenure at CCGD is 9.6 years; for senior management staff the average tenure is 18 years. All senior management staff, except one, are age 55 and over. The average tenure of all workers over age 50 is 10.4 years. This includes seven mature workers who were hired one year ago. In recognition of its flexible work practices, CCGD has received the Alfred P. Sloan Award for Workplace Flexibility for the past four years.

Background

The Community Council of Greater Dallas, founded in 1939, is involved in a wide variety of social service initiatives. CCGD is one of about 50 local planning councils that belong to the National Association of Planning Councils (NAPC), a membership organization of citizen-led, community-based, nonprofit social service planning agencies throughout the United States. They share a mission: to marshal human and financial resources to improve the quality of life for people in their communities.
CCGD acts as a neutral convener and facilitator for organizations in the Greater Dallas area involved in providing health and human services. In addition to seeking solutions to critical community needs, it conducts research into emerging and current issues and advocates for issues within its mission. It has also served as an incubator for new social service agencies.

As first responder in disasters and emergency situations, CCGD manages the Dallas regional 2-1-1 Information and Referral Center, which operates 24 hours a day, seven days a week, 365 days a year. CCGD’s cutting-edge technology enables staffers to answer incoming calls to the 2-1-1 telephone line and access its information and resource database remotely. That means that CCGD staffers can work from any location, including home, if necessary.

The Council is also home to the Dallas Area Agency on Aging, which it has administered since 1978. Other CCGD initiatives include: preventing childhood obesity, childhood immunization programs, planning services for seniors, and outreach and enrollment activities for people seeking Texas state benefits.

A Variety of Flexible Work Practices

Flexibility at CCGD applies not only to the hours of work, but also to how and where work gets done. Employees may vary their hours on a daily basis or periodically as needed, work on a compressed workweek schedule, or telecommute from home or out of town. The 2-1-1 call center specialists have three choices of work shifts. Those with the longest tenure get first choice. 2-1-1 specialists are also provided with their own ergonomically designed chairs.

Employees have been granted extended leave time, in some cases borrowing against future leave, to accommodate maternity, continuing education plans, or extreme family situations. Blaine cited the case of a member of her senior management team who, at age 76, took a year-long leave from the agency because of a serious illness. CCGD policies enabled him to take six months of sick time with pay and another six months of long-term disability. When he returned, he worked shorter hours and eventually retired at age 78. Thus, CCGD’s informal approach to phased retirement enabled a long-term, valuable senior executive to return to work and transfer job duties, responsibilities, and knowledge in an orderly, planned fashion. “This was our number two person in senior management,” said Blaine. “Letting go of his responsibilities was hard for him, and, in fact, his wife came in to talk to us about it.” While making that transition was not easy, without flexibility it would have been impossible.

Other instances of flexibility include employee choice on overtime and work breaks, ability to move on and off the management track, and opportunities to change departments. In addition, staff members are able to volunteer on paid work time.

Cross-Training Is Critical

One factor that has enabled flexible work practices is that employees and departmental teams are routinely cross-trained and thus able to carry out more job responsibilities than if trained for only their position. Several case managers began their career as 2-1-1 specialists and as a result are more familiar with social service community resources. Two senior management staff members are cross-trained to assume the executive director’s duties in an emergency.

CCGD played a critical role in the response to Hurricanes Katrina and Rita, and continues to work on the resettlement of tens of thousands of survivors evacuated to North Texas after the storms. CCGD workers staffed information tables in the Disaster Recovery center adjacent to the mass shelters for seven weeks. They gave evacuees referrals for housing, food, clothing, furniture, school enrollment, driver’s licenses, and jobs. Case workers helped make sure all seniors who were given emergency shelter in nursing homes or assisted care housing were in the proper place, and facilitated their move if necessary. 2-1-1 specialists answered tens of thousands of calls from evacuees looking for housing, medical treatment, and transportation. Staff members changed their work hours as needed, and used their cross-training to help out when others were overwhelmed.

“Because CCGD is a first responder for emergencies and disasters, we know we can be called upon at any time to shift into emergency response mode,” Blaine said. “When this happens, many staff members lay aside their regular duties and assume their emergency response activities for as long as they are needed.”
Trust and Communication are Key

Trust and open communication are the basis for making this kind of flexible workplace run smoothly. To ensure continuity in operations, all senior management staff are required to work one common day a week, no matter what flexible schedule they are on.

Some staff members are less comfortable in a flexible work environment, preferring more concrete rules and boundaries. These staff members are free to work a standard 5-day, 40-hour workweek. To make it easier to reach staff members who are not sitting at their desks, CCGD management issues a printed schedule of each worker’s office hours, work-at-home hours (or, as employees call them, “no-drive work days”), and phone numbers. The staff knows that wherever they are working, they must be accessible to other staff members by phone and by email.

“Our organizational culture is such that people generally like what they are doing here. The focus is on results, not how many hours you put in,” Blaine said. “Flexibility has increased our productivity.” If the work is not getting done, a manager or supervisor may intervene.

Also critical is CCGD’s “No Wrong Door” policy. Several years ago, Clare Rothmeyer, who was then CCGD’s manager for information and referral (the predecessor to 2-1-1) coined the phrase “No Wrong Door,” which has since become an agency motto. According to Blaine, “‘No Wrong Door’ means that when someone calls 2-1-1 or the CCGD, we never tell them ‘we don’t do that here’ without trying to connect them to the proper resource that can help them.”

As noted earlier, CCGD’s technology also supports flexibility: Its database can be accessed remotely by 2-1-1 specialists and other employees. “If someone is home with a sick child or not feeling well themselves, we would not want them to come to work since they couldn’t be productive and may be contagious. Being able to access our data base may mean they can accomplish some important work from home if needed and if they are able to,” said Blaine.

The Business Case for Flexibility

Blaine cited numerous benefits of flexibility, including increased employee satisfaction, productivity, loyalty, organizational flexibility and responsiveness, and lower training costs. “Because employees feel valued, their contributions to the organizations increase,” she said. “Not only does their dedication and commitment to the organization increase, they also seek ways to be creative and resourceful.”

After Hurricanes Katrina and Rita, CCGD staff members were dealing with 60,000 evacuees who fled to North Texas. For a few days everyone on the Emergency Response Team had to stay in the office. “At the suggestion of some staff members, we hired a babysitter to be on the premises, brought in some cots, and, in effect, were able to create a makeshift daycare center,” said Blaine.

Flexibility and teamwork has also enhanced organizational “memory.” When the 78-year-old senior manager retired from CCGD, the organization retained his work practices and knowledge due to a work schedule that allowed him to collaborate closely with other senior staff, and to informally mentor younger, less experienced staff members. “Thus, what we’ve invested in training pays off for years,” said Blaine.

The Business Case for Mature Workers

Forty percent of CCGD’s staff is age 50 and over. Marilyn Self, CCGD’s associate executive director of coalitions and planning, came to CCGD as a college intern 23 years ago. She now trains college interns, who rotate through CCGD as part of their college degree work, and manages all of the agency’s coalitions and research projects.

The agency’s chief financial officer, Vicki White, has been with CCGD for 21 years and is responsible for creating the sophisticated financial systems that allows it to serve as a fiscal agent for millions of dollars in the Dallas community. Several staff members joined CCGD as information and referral call specialists and are now case managers or benefits counselors for senior citizens. “Their years of knowledge about social service resources helped make them into outstanding professionals in their current jobs,” Blaine said.
While some managers may worry that mature workers will become less productive, particularly as they approach retirement age, CCGD has found the opposite to be true. These workers tend to be especially resourceful in taking on new programs and reinventing their jobs, said Blaine. CCGD’s cross-training practices have meant that senior staff members, many of them mature workers, have created and recreated their jobs in response to organizational needs: for example, learning protocols for good advocacy or new fund-raising techniques.

Although CCGD pays higher medical premiums for its mature workers, those employees have far fewer sick days than its overall workforce. “Mature workers tend not to take time off when they feel a little under the weather,” said Blaine. “Rather, they work from home so as not to infect coworkers.”

As part of its emphasis on wellness and prevention, CCGD encourages physical activity by all employees and tries to model good nutrition practices in the food served at business meetings. Staff members who show they have completed the most physical activity each month are acknowledged at the monthly full staff meeting. “Because we believe a healthy workforce is an effective workforce, CCGD pays the full monthly premium for our low cost HMO health insurance for all employees that work at least 30 hours a week,” said Blaine.

**NAPC: a model for organizational learning and action**

The National Association of Planning Councils (NAPC), the membership organization of local planning councils, has taken a leadership role in recruitment and retention of mature workers and volunteers at the local level. According to Martha Blaine, who serves on the NAPC board, the organization is committed to two-way communication with its local councils—disseminating information researched at the national level among local communities and gleaning information at the grassroots level to spread nationally.

At its annual meeting in May 2008, the board passed the Initiative on Recruitment and Retention of Mature Workers for the Nonprofit Sector, which has created pilot projects in nine communities across the nation. Some examples of actions taken at the local level:

- Convening interested community organizations to learn about the topic, including universities and community colleges, nonprofit management centers, senior organization, volunteer centers, foundations, and corporations
- Facilitating discussions with local corporations regarding their retirees’ interest in nonprofits
- Creating pathways for “sector switchers”—those individuals transitioning into nonprofits from corporate or government jobs
- Helping to create training and curricula for sector-switchers and current nonprofit workers
- Partnering with local colleges and universities on original research

The NAPC issued a consolidated report, *Mature Workers Initiative*, in February 2009 describing the activities of these pilot projects (www.communityplanning.org).

**Next Steps at CCGD: Developing On-Ramps**

As part of a pilot initiative, CCGD is working with a group of representatives of nonprofit, private, and public sector organizations to develop pathways or “on-ramps” into nonprofit organizations. This group includes professionals from the DAAA, Texas Instruments, The Senior Source, the Center for Nonprofit Management, the Volunteer Center of North Texas, The University of Dallas, The University of Texas, and an executive search firm. “Although the group is still in the very early stages, the issue of mature workforce recruitment is clearly on our radar screen, and members are asking the right questions,” Blaine said.

**Challenges Ahead: Flexible Benefits, Multigenerational Workforce, Job Redesign**

What types of insurance benefits will be most useful and appealing as CCGD’s workforce matures? And how should benefits be tailored to attract those interested in part-time work? These questions are being considered by a community-wide insurance group comprised of 55 nonprofit agencies in the Dallas area that have pooled their resources to obtain discounted group health plan rates. CCGD is a member, and also serves as the plan administrator for this group, which covers 800 employees and family members.
Currently, employees must work a minimum of 30 hours a week to qualify for coverage; the group is studying the consequences of lowering this minimum to 25 or 20 hours a week—a move that could potentially help organizations increase recruitment of mature workers who need health care benefits but want to work part-time. Allowing workers who work fewer hours to participate in this group insurance would increase the overall number of people insured, thereby increasing the group’s ability to negotiate the best rates and coverage. It would also make health insurance coverage more affordable for smaller nonprofits.

Another critical challenge for CCGD will be building a cohesive workforce of Gen X, Y, and mature workers. Job redesign will also be on the agenda as senior management staff makes the transition to part-time roles and more boomer-age volunteers come on board. “If people want to get rid of certain parts of their job, we need to ask if there are other staff members who want these responsibilities, and could be mentored to take over new responsibilities. Or perhaps some of these responsibilities would best be given to volunteers,” Blaine said. “We are trying to figure out how to integrate experienced volunteers into multigenerational workforce teams.”

Lessons Learned
Blaine concludes that CCGD has learned that a productive, happy, and competent workforce—of both mature and younger generation workers—is the outcome of:

- Practicing respect for each other and all those outside the agency
- Coaching staff who are learning new skills or are reluctant to make change
- Building trust by expecting the best from everyone unless proven otherwise
- Keeping the Board of Directors involved and always in the communication loop
- Knowing how and when to move nimbly and make change as needed

Contact Information:
Martha T. Blaine, Executive Director
Community Council of Greater Dallas
1349 Empire Central, Suite 400
Dallas, TX 75247
mblaine@ccgd.org
www.ccgd.org
www.communityplanning.org
Generations Incorporated (GI)

At a glance:

Location: Boston, Massachusetts

Mission: To unite mature adults and youth to strengthen individuals and communities

Size: Eight full-time, six part-time employees, 350 volunteers (100 stipended, 250 non-stipended), 50 percent of employees age 50 and over; $2.1 million budget

Workforce strategy: To create a thriving multi-generational staff that shares its experience, knowledge, and energy to meet the organization’s goals efficiently and effectively

Outcomes: • Improved practices for recruiting and retaining experienced workers and mature volunteers, including flexible work arrangements, paid part-time managerial positions, leadership roles, and recognition
• Creation of an intergenerational workforce that practices caring, respect, and teamwork

Programs: In 2008 more than 350 volunteers age 50 and older mentored 2,668 students, helping to improve their literacy skills twofold over students not receiving services

Background

Generations Incorporated (GI) began its intergenerational work in 1991 when it brought middle school students to nursing homes to develop meaningful relationships with residents. In the late 1990s, the organization shifted gears dramatically and began to focus on children’s illiteracy. Before, most staff had been fairly young. But when GI turned to improving literacy rates, it started attracting retirees to tutor and mentor children in Boston public schools and Boys and Girls Clubs.

By 2002, 40 mature volunteers were helping nearly 500 children, bringing the organization significant national attention. The organization received a four-year expansion grant from Experience Corps®, an initiative of Civic Ventures that recognizes mature adults and retirees as resources and engages them in meaningful work. Experience Corps is active in 20 cities and works to solve serious social problems, beginning with literacy. Members who work at least 15 hours per week receive a modest stipend.

In 2003, GI became the only Massachusetts organization to receive full funding from AmeriCorps VISTA, a national service program designed to fight poverty. It is a program of the Corporation for National and Community Service, an independent federal agency whose mission is to improve lives, strengthen communities, and foster civic engagement through service and volunteering. AmeriCorps members, generally young adults, commit to serve full time for a year at a nonprofit organization or local government agency. Through Experience Corps and AmeriCorps, the mission of bringing younger and older people together around a social purpose remained strong during and after this major change in direction.

Organization

Today, GI’s strategy is to support existing children’s programs at other institutions, such as schools and after-school programs, rather than creating and delivering redundant services. Generations Incorporated operates in 18 schools, with a team of 10 to 30 volunteers in each, depending on school size. On site, Experience Corps members work in a variety of programs—Reading Coaches, Classroom Literacy, and Lunchtime Mentoring.

The downtown offices of GI are a flurry of activity in early September. Staff and volunteers of all ages spend the month in extensive training before heading to their base of operations, a public school or after-school program. There is a striking prevalence of mature adults—trainers and trainees—working alongside younger AmeriCorps members and staff. And these workers, in
turn, support the Experience Corps members and the older volunteers.

GI is a small organization with a relatively simple structure: an executive director, director of development, director of finance and administration, director of programs, and directors for recruitment, training, and evaluation. The director of programs is responsible for all field operations, overseeing four clusters.

In 2008, GI created a new organization model called the Cluster Model. A cluster consists of three schools and/or after school programs. Each cluster has a cluster manager, three site coordinators (one per school), three or four AmeriCorps members, and three teams (one team per school) of Experience Corps members. Together, GI’s six clusters serve over 2,600 children in 18 different locations.

Cluster managers are part-time (15 hours), salaried management staff, all older adults. Cluster managers are responsible for field operations in their three designated schools. They establish and maintain relations with the school principals, supervise the site coordinators and AmeriCorps members at each school, and collect data for reporting and evaluation. Most important, they communicate the goals and objectives of the cluster and work with its members to meet them.

Site coordinators are also mature adults. They receive a monthly $450 stipend for about 20 hours of service per week. There are three site coordinators per cluster, one per school and/or school program. Each manages a team of Experience Corps members at a school or after-school program and is responsible for implementing literacy programs. The site coordinator manages the student referral and match process, creates schedules for all Experience Corps members, and ensures that GI programs are efficient and effective. Site coordinators must juggle these duties and relationships while making sure the school principal remains satisfied with the program. Most site coordinators have previously served as Experience Corps members and are versed in GI’s programs.

AmeriCorps members work full time, serve at GI for 10 months, and receive a modest stipend. Because most of the volunteers and staff surrounding the AmeriCorps members work only part-time, coordinating schedules has been a challenge. “The devil is in the details, and we have lots of details,” said executive director Mary Gunn. The average AmeriCorps member is a recent college graduate who wants to perform a year of service before entering the world of work or graduate school. An AmeriCorps lead is a second year AmeriCorps member who is assigned more responsibility than first–year members.

GI engages 29 AmeriCorps members. Three AmeriCorps members are assigned to each cluster, one per school. Additionally, one AmeriCorps lead is assigned to each cluster manager, supporting AmeriCorps and Experience Corps members, covering for absences, and helping with special projects. Nine other AmeriCorps members serve in the office, working at training, recruitment, and fundraising.

GI engages 350 Experience Corps members—all over age 55—in Boston. On average they volunteer for six hours a week to contribute to their community. They are assigned in teams to one of the schools, usually one close to home.

“We are an intergenerational organization by design. Five stars. Balance between younger and older has been central to our success,” said Gunn.

Attracting and Retaining Mature Talent

Gunn, who is the only full-time mature adult staff member, is straightforward about how she advertises positions aimed at her cohort: “Perfect position for retirees, part-time, benefits, flexibility, leadership opportunities, must have 25 years experience!” Once on board, older adults find these workplace practices:

Flexibility At GI, flexibility is intentionally built into leadership positions for older adults who are cluster managers. They are responsible for their own schedules and must be available 24 hours a day, seven days a week, by phone or email. They also must be available for one monthly staff meeting and weekly management meetings. All cluster managers have July off.

These flexible work arrangements enable some older workers to meld work and other interests. Tom Galvin, a cluster manager, lives in his house on Cape Cod four days a week and has a small place in Boston for the three days he works. He is a retired school principal in his third year with the organization, having spent his first year as an AmeriCorps member responsible for coordinating literacy programs. “If I said ‘everyone has to work 10:00-2:00,’ that wouldn’t work. Older adults want flexibility,” said Gunn.
How does GI manage all of this flexibility? The clusters each have a clear set of goals, including the number of children to be served and what outcomes they will have as a result of the program. One goal is that no child will miss a literacy session because someone is sick or absent.

Because the volunteers operate as a team, they can work with different students if necessary. Everyone knows everyone else, everyone contributes, everyone owns the team. And though cluster managers work only three days, they are on call at all times—a rule they devised, not one that was imposed on them.

**Benefits** In addition to the summer hiatus, all staff and stipended AmeriCorps and Experience Corps members get paid (or stipended) personal time off. The organization also pays for a $59 monthly public transportation pass. For all salaried employees the organization contributes two percent of salary into a retirement plan.

**Recognition** also plays a role for part-time and full-time staff and volunteers. Whether at monthly meetings, year-end events or at school sites, mature workers are recognized publicly for making an impact. Notes one cluster manager when asked about recognition: “We are treated no differently than any other employees. We get the same as full-time employees.”

**Training** Generational differences sometimes alter training practices. “Orienting older adults to our work requires an understanding of differences in how we learn,” said Gunn. “Younger people often like icebreakers and team-building games. Older adults want to wrap their hands around the work and quickly get to the task at hand. The organization has carefully crafted a balanced training program that is outcome focused.” A tool that enables the organization to meet the preferences of younger workers is specialized, age-specific training provided to AmeriCorps members. This training is required by AmeriCorps, but it is provided by the GI training department.

**Building Intergenerational Synergy**

“Intentionality” also describes the intergenerational work environment. Mentoring, reverse mentoring, role modeling, and intergenerational work teams are the modus operandi at GI’s central office and at the sites.

While mentoring is often informal, it is widespread and intergenerational because the organization hires and trains people of different ages to work together. The physical design of the workspace, though not intended to facilitate intergenerational interaction, creates a milieu where mentoring happens easily. Program directors share one large office and give each other support, as do cluster managers and AmeriCorps members. One manager described his role as less a “boss and more a mentor and supporter to help others develop their style.”

More formally, cluster managers are expected to spend one-on-one time each week with AmeriCorps members on their team. The one-on-ones focus on growth in leadership, career orientation, and the member’s interests for post-AmeriCorps life.

In any office, meetings of intergenerational work teams can be tense, or workers may be reticent because of stereotypes about other generations. With the technology divide, it’s often young versus old, even at GI.

But if one extends the organizational assumption that everyone is learning and everyone is contributing, such individual differences become secondary. Meetings are structured with an agenda created by staff, and requirements that each person take responsibility for different parts of the meeting.

At monthly staff meetings, team problem solving is used to address operational issues. “With fifteen people sitting around a table, processing the work—what’s successful, what’s not—working together to solve problems, learning is evidently palpable,” said Gunn. “People say this is one of the most important reasons they want to work for us.”

Gina Hey, 31, is GI’s full-time director of programs, and has been with the organization since she started as an AmeriCorps member four years ago. She was recently promoted to the senior level management position when her 68-year-old predecessor left for the Peace Corps. That worker mentored Hey for three years, preparing her for her current job. Leaders are trained in facilitation skills from the beginning, Hey said, and called the approach a “big deal” in building and supporting intergenerational work teams.

**The Role of Leadership and Culture**

Gunn has been instrumental in fostering a positive intergenerational work environment and a culture of flexibility. She and her managers attribute success to an explicit ethos of excellence, caring and learning (no matter one’s
age). Gunn and others said that it is important to listen to mature employees—a critical success factor identified by research in the private-sector management of such workers. At GI, listening is not a casual affair of hearing talk at the water cooler or venting at meetings. It entails serious evaluation of what is working in the programs, what changes are needed, and collaboration with the board to implement those changes.

One of them was the creation of leadership roles for mature adults in part-time jobs. In this, one staffer described the executive director as “instrumental, a leader in the shift to have older adults become leaders.”

“Culture is very important,” said Mary Gunn. “We respect and trust each other, and have created the cluster model to ensure the practice of our ethos. Everyone who works or serves with us has been invited to join our organization because each has something to offer. We all bring value, and yet, ‘It’s not about you.’ And sometimes, like any other workplace, some people don’t fit. We carefully screen everyone at every level of the organization to determine the fit, but sometimes, rarely, we miss.”

Program Outcomes Follow Suit
Programs are evaluated quantitatively and qualitatively. Literacy levels are measured before intervention, midway through the school year, and at the end of the year. In 2008, more that 350 Experience Corps members and 20 AmeriCorps members provided 85,000 hours of tutoring and mentoring to 2,668 students, helping improve their literacy rates by an average of 2.2 reading levels.

In addition to internal evaluation, Washington University was commissioned to do a rigorous evaluation of the program in 2007. The results show statistically significant literacy gains for students served by the program, versus students in the control group. The study also evaluated the impact on Experience Corps members. They too received substantial benefits of better health, connection to community, meaningful engagement with children, and a stronger social network.

Lessons Learned
Lessons learned at GI are profound and simple. First, mature adults need opportunities to manage themselves. A retiree who has joined the staff as a cluster manager sums up this need: “If you have hierarchical leaders, you need to send them back where they came from. You can’t have a workplace that’s competitive if you want older people to stay around.” That means:

- Listen to your workers, mature and young.
- Recognize that mature adults can add value to the workplace.
- Leadership sets the tone for the staff and the Board.
- Organizations should create meaningful, part-time leadership roles for mature adults.
- People of all ages thrive in an organization built on team building and trust.

Staff interviewed for this case study see the critical next steps for the organization as:

- Getting and using continual feedback on the new staffing model.
- Staying flexible in how the work gets done.
- Mentoring newly configured multi-generational teams.
- Understanding and adapting to people’s evolving goals and motivations.
- Developing ways to make the program replicable and scalable.

GI is expanding into new communities; the number of schools served grows each year, bringing expected growing pains. There are also signs that the talent pool is changing. While the average age of Experience Corps members is 70 or older, the organization is beginning to see younger baby boomers considering a volunteer role. If history is a predictor, GI will listen to boomers and learn about new needs and expectations they bring to the table.

Contact Information:
Mary Gunn
Executive Director
Generations, Incorporated
25 Kingston Street, 4th Floor
Boston, MA 02111
mgunn@generationsinc.org
www.generationsinc.org
Alpert Jewish Family and Children’s Service

At a glance:

Location: West Palm Beach, Florida

Mission: To serve the Jewish community primarily but not exclusively and fulfill its obligation of “tikkun olam” (repairing the world) by providing a wide range of social services to individuals and families

Size: 101 full-time, 83 part-time employees; 66 percent of employees age 50 and over; over $7 million budget

Workforce strategy: To recruit and retain seasoned employees through flexible work practices, a team approach, good benefits, and continuous learning and training opportunities

Outcomes: A 47 percent increase in employees age 50 and over since 2000; average tenure of employees age 50 and over is 11 years; improved client services; and an Enhanced Companion “senior-helping-senior” program

AJFCS Employees are Redefining Retirement

With its sunny skies, waterfront location, and pristine golf courses, West Palm Beach is one of the most popular retiree destinations in the U.S. It is also the home of the Alpert Jewish Family and Children’s Service, a nonsectarian social services agency that has grown tremendously over the past 31 years, its staff increasing from five in 1986 to almost 200 today. With two-thirds of its workforce at age 50 or above, AJFCS employees are living proof of the trend to redefine retirement.

AJFCS excels in recruiting, training, and retaining what it refers to as “seasoned employees,” and its employees brag about their “recidivist club”—the 20 or so employees age 50 and above who left the agency over the years, thinking they would retire, only to come back to work. Yet, when asked about its special practices to attract and use the skills of its mature workforce, associate executive director Jenni Frumer said, “For us, it’s just the most natural thing in the world. We wouldn’t think anything we’re doing is special.”

As illustrated in a series of informal focus groups conducted at AJFCS offices with 20 seasoned employees ranging in age from 50 to 81, it’s clear that AJFCS has created a special workplace: an organizational culture that supports flexibility, teamwork, continuous learning, and expanded and enhanced client services.

Background

AJFCS is a nationally accredited social services agency serving Palm Beach County with over two dozen programs and services for individuals and families. The agency provides information and referral; counseling and support groups; geriatric and child psychiatry; guardianship; case management and companions for the elderly; a domestic abuse program; children’s services; a mentoring program, and residential services for adults with special needs, among other services. The AJFCS’s mission also incorporates specialized services for the Jewish population, including a project that addresses the unique needs of Holocaust survivors.

AJFCS strives to respond to the constantly changing needs of the Palm Beach County community through a variety of innovative programs and services. One program, Enhanced Companion matches senior volunteers and workers with elderly adults who live at home—often alone—and need companionship and help with doctor’s appointments and errands. The program consists of a volunteer component, funded through an AmeriCorps grant, and the agency’s regular Enhanced Companion program, which is staffed by paid workers, many of whom come through the AmeriCorps volunteer program. (See case study on page 25.)
The Focus Groups

Four informal focus groups were conducted with project managers, program supervisors, direct services personnel, and support staff. While individual backgrounds and personal stories of what brought them to AJFCS vary widely, five central themes emerged to explain why they stayed:

- A powerful mission combined with a supportive culture
- A flexible work environment
- Teamwork and collaboration
- Good benefits
- Opportunities for learning and growth

A Powerful Mission Combined with a Supportive Culture

When asked what attracted them to AJFCS, employees repeatedly cited the organization’s mission—“tikkun olam,” to repair the world, one family at a time. But beyond the mission, what distinguishes AJFCS, employees say, is an organizational culture and management approach that supports them in myriad ways. The management practices of Frumer, Executive Director Neil Newstein, and Human Resources Director Ellie Shiffman were frequently cited.

“It’s the fact that we are often empowered to make the difference that allows us to repair the world,” said Lee Eakin, who joined AJFCS in 2001 and directs the agency’s guardianship program. “And part of it is that we are recognized as being the professionals that we have trained for and worked hard to become. The thing that I value the most is that my judgment is accepted as being valuable.” That view was echoed by Debra Silver, a psychiatric nurse practitioner who has been with AJFCS for a short time—less than a year—but already sees differences compared with previous employers. After working for 30 years as a registered nurse at big hospitals, Silver grew disillusioned with the disconnect between organizations’ stated missions and how they actually operated.

“I would go to orientation meetings where the talk was all about the mission and goals, but then out on the floor, it was a whole different world. They were only concerned with the bottom line, they weren’t concerned with patient care or staffing,” said Silver. In contrast, “the people here are amazing—there’s a higher level of being. People are devoted to the mission, but I also see a tremendous amount of respect that the administration has for the staff and vice versa, and respect for the community. That absolutely without a question would keep me motivated to stay here.”

As director of the guardianship program, Eakin is on 24-hour call. The program provides court-appointed guardians for those found to be incapacitated and handles all responsibilities involved—financial matters, medical issues, case management, day-to-living, placement in facilities, and funeral arrangements. It is demanding and stressful work, and being able to take a break from the job is essential.

Eakin told a story to illustrate the kind of management support that makes a difference: “I was heading to Epcot on a Saturday morning. I got a phone call from a facility that someone was out of diapers, and the supplier says they won’t deliver anymore because they didn’t get paid the last time by the facility. I pulled over, called Neil Newstein, our executive director, and gave him the information. His reply: ‘I’ll take care of it, have a great weekend.’ For me, that was fascinating: I had never worked for an organization that did that. Instead, the response would be, ‘How are you going to handle that?’ It’s totally different here.”

A Flexible Work Environment

Flexibility, as a management practice, permeates the organization: it extends to work schedules, job roles, pay plans, and, in general, how work gets done. Also critical to the practice of flexibility is an emphasis on professionalism and accountability.

Flexible Schedules

Although the majority of AJFCS employees interviewed work full time (a minimum of 30 hours per week) in several cases employees put in many additional hours. Because they are able to adjust their hours, and do so in an environment of trust and respect, the arrangement works.

“That’s one of the things that makes it really desirable for me, there is flexibility in my job,” said AmeriCorps Volunteer Coordinator Nancy Frent. “For older workers, you want to be with your children, or with your grandchildren, or with your friends, or have medical problems or sick family members. If you don’t have that flexibility—you’re not going to stay.”
Flexibility in Ideas and Job Roles
Management has also encouraged flexibility in the way tasks and programs are approached:

“There is no set way to do things,” said an executive who left a job in hotel sales to join AJFCS. They encourage exploration, trying things differently. That’s extremely important. If I have a tough client or a problem, executives and directors will ask, ‘How are you doing?’ and rearrange their schedule to help. They are setting an example for how I want to be as a professional.”

“They are always encouraging people to think out of the box and get excited about new ideas,” said AJFCS employee Phyllis Hoffman. “That’s not saying we don’t have process, (which is Jenni’s favorite word), so when you come up with a new idea, you have to go through a process to see how it will work. The flexibility comes in ideas and in responsibilities.”

Hoffman, like several others at AJFCS, is full-time, but splits her time between two major part-time roles as admissions director for the residential program and an associate in the fundraising department. In an organization without the right supports in place, that arrangement might be problematic. But at AJFCS, this flexibility has led to even greater job satisfaction among mature workers.

“This agency looks at what your skills are and uses them. Initially, when I applied, I was responding to an ad for case manager,” said Sam Vitoulis, a social worker and case manager. “But after my job interview, I was assigned to intake and referral because I had the skills to determine clients’ needs. I now wear two hats. I work as a case manager in elder connection doing initial assessments and monitoring clients at their homes, and I also handle information and referral for the I&R department. And, since I have training in psychiatric disabilities, any case management case that has a psychiatric disabilities component they refer it to me. It’s a lot of change, but variety is the spice of life. I like that!”

Holding multiple roles is not easy—especially when the roles require vastly different skills and are based on different approaches to the client, as with guardianship and case management. Penny Maitner, a case manager for the guardianship program, knows this firsthand, and while she admitted “sometimes feeling almost schizophrenic” in moving back and forth between the two roles, she cited the organization’s mission, the ability to communicate with her peers, support from her immediate supervisor and management, and the sheer satisfaction of working as factors that keep her motivated and energized.

Flexible Pay
In some instances, depending on the position, management uses a different kind of payment plan that places the focus on results rather than work hours. For example, some case managers are paid according to the number of clients served rather than hours worked—an arrangement that allows flexibility for the employee and, because of a team approach and strong management support, assures high-quality client service.

Jenni Frumer cited the example of Peggy Hammond, a case manager who has been with the agency for 20 years. Described as an “incredibly talented, skilled professional who is committed to her clients,” Hammond has occasionally needed time off, in one instance taking a month to care for a friend who was dying. Employees understand they have to communicate with their supervisors and together come up with a plan to assure client coverage. In Hammond’s case, she knew there were certain clients whose needs she could attend to by phone if necessary. “If there were a crisis, she knows, as we know, that she would put in a call to me or her immediate supervisor to say, for example, ‘I need someone to visit Mrs. Jones in the hospital today,’” said Frumer.

Tying pay to performance or results is one example of how AJFCS focuses on outcomes in a flexible work environment. Not everyone thrives in such an environment. New employees, especially, have to learn how to “negotiate” the culture, manage their goals and outcomes, and figure out “how to be the best professional they can be. There’s no manual for this,” said Frumer. “Anecdotally, those who tend not to make it either struggle with our open learning culture, which stresses that no one person has all the answers, or they don’t accept responsibility for results and therefore generally don’t meet the professional expectations. Senior leadership and the board expect great things from our employees. And while we can’t prescribe how to be a great professional, our values and philosophy of practice do express what we expect from great professionals, working within the agency’s strong mission.”
**Teamwork and Collaboration**

While AJFCS does not have a formal team or buddy system, employees and supervisors work together to achieve that goal and develop plans for client coverage. Hammond identified another employee who could fill in for her while she was away. “Before Peggy leaves, she would say to me, ‘I’m really concerned about this client’,” said Frumer. “I would like to introduce this client to Doni and have him accompany me on the next several client visits so he’ll be prepared in case something happened while I’m away.’ She knew Doni would make a really good fit for this client, and she understood how best to meet our client needs. That’s the team piece that has allowed us to retain amazing talent.”

In the intake and referral department, where much of the work is conducted over the phone, employees and supervisors communicate regularly about their cases and critical information is computerized, so that if someone is away, another employee can easily follow through. The team approach is more formalized in the guardianship program, since the services depend upon input of various professionals, from case managers to psychiatrist and attorneys. Both director Lee Eakin and case manager Penny Maitner are on 24-hour call and work practically in tandem to cover cases. “Very often we will list both of our numbers in facilities, so if they don’t get Penny, they will get me, which is helpful,” said Eakin. “We’re really clear that they can speak to either of us. We fill in for each other.”

**Good Benefits**

AJFCS benefits include:

- **Medical.** HMO provided by the organization. Employees can purchase a family HMO or PPO plan.
- **Flexible Savings Plan.** Employees can save pretax dollars for medical and dental expenses not covered by insurance.
- **Long-Term Disability.** Employees can accumulate up to three months of sick leave covered during the eligibility period until a disability plan provides coverage.
- **Life Insurance.** Employees are eligible after 1,000 hours.
- **Retirement Plan.** 401k with a two percent employer match.
- **Vacation.** Four weeks for professionals and administrative assistants.
- **Holidays.** Jewish and legal holidays off.
- **Flex time.** Flexible hours for most employees.
- **Training.** Formal training program for staff, with significant staff input into content.

Training counts toward continuing education units for license holders, and agency provides for additional continuing education, including reimbursement for tuition towards advanced degrees.

**Opportunities for Learning and Growth**

While about two percent of the annual budget goes to formal training, such as annual conferences, the agency does much of its staff training on site, bringing in experts at little cost. Training includes such topics as cultural competency, enhancing clinical skills, and best practices in clinical work.

“The doors in this agency are all open, unless someone is seeing a client or there’s a confidential meeting between a supervisor and employee,” said Olivia Tartakow, director of intake and referral. And that access extends up the line to the executive director. I’ve often gone into Neil’s or Jenni’s offices to request different things. . . . It almost looks chaotic for someone new here: you may be sitting in with a supervisor or co-workers, and two or three people are coming in just for a few minutes. Ironically, what that does for clinical purposes—since the conversation may be about a client and because we share clients across different departments, such as counseling, referral, psychiatric, and long-term care—is to assure a constant sharing of information. It may look like chaos, but it’s planned chaos.”
A New York native, Tartakow started her career as a vocational rehabilitation counselor, moved to a management position in New York City government, relocated to Florida, and then began a third career as a certified financial planner. Along the way, she earned a master’s degree in education. After working at AJFCS for five years and with Jenni Frumer’s encouragement, she went back to school at age 50, while working full-time, and earned her MSW. AJFCS paid for her education. In addition, the agency pays for professional licensure and attendance at conferences.

The potential for advancement has also attracted employees to AJFCS. “I started out as a receptionist here,” said administrative supervisor Ina Schwartz. “When I interviewed for that position, I learned that the person I was replacing was going on to a higher position in the organization. And that’s what [human resources director] Ellie said: ‘We like to hire and promote from within.’ I saw that it was really happening.”

AJFCS employees did voice some frustrations. They included long hours, low pay, unused vacation time, and feeling “stretched” due to the agency’s growth and increased demand for services. Nonetheless, they seemed to accept these conditions as part of the nonprofit world, and any complaints were outweighed by the benefits cited.

Indeed, as Janet Lehman, supervisor of the residential apartment program, said: “After I’ve had a vacation, while it was nice to get away, I’m glad to be back at work. That’s a really great feeling.”

Contact Information:
Neil Newstein, Executive Director
Alpert Jewish Family & Children’s Service
5841 Corporate Way, Suite 200
West Palm Beach, FL 33407
nnewstein@JFCSonline.com
www.jfcspb.org.
American Heart Association

Building a World-Class Workforce

The American Heart Association is well known for its world-class programs in health research, professional and public education, advocacy, and extensive community outreach, including its prominent Go Red for Women campaign, a heart disease awareness program for women. Less well known, however, may be its focus on professional development and building a world-class workforce that can carry out its mission and strategic goals. “In fact, many people don’t necessarily think of the AHA as an employer,” said Bill Achenbach, senior vice president of human resources. “I think the general notion of the AHA as solely a group of men with white lab coats, doing research and carrying around their legal pads and pens is rapidly changing.”

For the past two years, the AHA organization—including national headquarters and all eight affiliates—has worked to develop a multi-faceted workforce strategy. It includes a variety of management practices and several Employment Branding initiatives, such as a new AHA Careers website with employee testimonials and career paths (www.americanheart.org/careers), a new online recruitment process, and an extensive marketing/recruitment makeover.

In May 2008, the organization began to launch American Heart University (www.americanheartuniversity.org), a virtual center where AHA employees are offered over 150 on-line job-related and career-oriented courses on such topics as advocacy, health care, communications, finance, fundraising, and technology. Courses are offered online and in workshops at various AHA locations.

A Compelling Place to Work for Young and Old Alike

The notion of a “compelling place to work” describes AHA’s overarching workforce strategy, Achenbach said. AHA is successfully reaching both mature and younger workers. “The majority of folks today value an employer that provides an opportunity to grow and develop, whether it’s a mature worker or the next generation of workers,” he said. “We’re getting our message out to all ages and sectors. Communicating what we do and what we’re all about has been a hurdle to overcome. But, in fact, the AHA is well advanced technologically, and very contemporary in its management practice, focused on strengthening capability across the entire association.”

AHA’s investment in professional development, combined with its mission, is the magnet that attracts—and retains—young, mid-career and mature workers.

AHA’s Employment Branding initiative is not specifically targeted to mature workers, but Achenbach believes its message is particularly appealing to them. “For the mature workforce, particularly those coming from for-profit careers,” he said, “the notion for some has been ‘giving back while working for a more lofty purpose.’ And people are also seeking challenge. We can offer the same level of challenge as in the for-profit world.” Achenbach himself is an example of an executive who has transitioned to the non-profit world, and has successfully adapted HR management practices to a nonprofit setting. Before joining AHA in 2001, he served in HR leadership and field management roles for Sears Roebuck and Company.
Developing the Workforce Strategy

To develop its workforce strategy, AHA assembled a team of management representatives from its Dallas national office and eight local affiliates, as well as outside human resources experts. This team formulated four key questions to help guide its work:

- How do we manage AHA to become an even more compelling place to work?
- What are the key strategic capabilities (bundles of people, information, and technology) that the AHA must have to deliver on the mission?
- How can hiring, developing, engaging and retaining top talent help us execute our strategy more efficiently and effectively?
- What role does the workforce and HR function play in developing and delivering on AHA’s strategic capabilities?

To address these questions, the team reexamined the AHA’s business strategy, which encompasses the organization’s mission, goals, and high-level outcomes. Then the team identified 12 key organizational capabilities that AHA needs to effectively carry out its mission. Of those, the team selected talent management, revenue generation, and volunteer management as its top three priorities. Talent management has the highest priority. Achenbach describes why:

“Talent management is the lynchpin for successfully executing our business strategy. By identifying talent management as the place to start, we, in turn, were able to focus our attention to enhancing specific management practices to support attracting and retaining top talent and high levels of performance.” Over the past year and a half, the team has been reevaluating its key management practices. Two major initiatives are the Employment Branding program and the American Heart University.

AHA Employment Branding

Staff from the national office and eight affiliates around the country—in marketing, HR, design, technology, and communications—helped develop the AHA Employment Brand. The results are a totally redesigned Careers website that enhances and updates AHA’s look and feel, a new E-recruiting process, and a variety of marketing and communications materials for recruitment purposes.

Careers Website

From its homepage, a potential job seeker can click on “Careers,” which then presents various option headings to explore, including Job Search, Life at AHA, Benefits, Values, Diversity, Locations, and Testimonials. Its job search function allows one to search positions by department, location, and/or keyword. It invites job seekers—“whether you’re just starting out or you’re a seasoned professional”—to login on the AHA Careers website (www.americanheart.org/careers). Individuals can create online personal profiles and update them. In addition, individuals can view a history of jobs they’ve applied for at AHA.

“Life at AHA” provides an extensive account of AHA’s various fundraising activities, cause marketing campaigns, and other business operations and background information, while “Testimonials” contains career profiles of current AHA employees.

E-Recruiting

AHA’s online recruiting system enables the organization to better manage the large volume of resumes it receives each year and provide each candidate with more individual attention and consideration. Candidates fill out an online response form for an open position and their resume and qualifications are immediately entered into the AHA database. The information is also searchable by recruiters for other positions. AHA continues to accept hard copy and emailed resumes from individuals who contact the organization outside of its Careers website.

American Heart University

The recently launched American Heart University combines live facilitated workshops at various AHA locations and an online “corporate university:” a training and educational system that accelerates continuous learning and provides job-related and career-oriented programs that can be used anytime by AHA’s 3,500 staff members nationwide. “Many staff members work off-site or from home,” said Achenbach, “and they need to access knowledge in real time. This initiative is appealing to both younger generation and mature workers, who want to grow and develop, and who feel very positively about an educational system.” Early results indicate that 60 to 70 percent of employees are enrolling and taking courses at the AHA online university.
While not an academically accredited institution, AHU gives internal credits for courses that count toward various internal certificates, such as a diploma in fundraising. In addition, some AHU courses offer continuing educational credits, and in the future AHU is planning to connect with colleges and universities so that employees may use their credits toward continuing their formal education. Self-paced online courses are accessed through the AHU website and are open to all staff and their families.

The programs are also aligned with organizational business goals in various functional areas. Over 150 courses and workshops are offered in such job-related skills as oral and written communications, business literacy, marketing, presentation, and promotion. The AHU faculty includes trainers whose sole responsibility is teaching workshops and others who deliver training as part of their broader responsibility.

AHU is comprised of 20 schools that relate to AHA’s functional areas, such as HR and Diversity, Cultural Competence, Healthcare Markets, Corporate Operations, Volunteer Engagement and Management, Fundraising, Technology, and others. Each school is led by a dean who works closely with the university leadership team to ensure that courses and diploma programs within their functional areas fulfill organizational business requirements. An executive council comprised of both field and national center leadership is the governing body ensuring that AHU meets the association’s evolving business needs.

Diploma programs vary in length, and may be a combination of online courses, workshops, on-the-job training, case study work, and a thesis. Diploma programs must be approved by the employee’s manager as part of the employee’s review and learning plan, which is determined by a conversation between the employee and manager. Eventually, learning plans will be part of all employees’ performance objectives.

AHA as a Compelling Place to Work: Measuring Success

AHA’s strategy to become an even more “compelling place to work” has touched workers in a variety of ways. The majority of AHA workers age 50 and over are in leadership roles, said Achenbach. “While the next generation of workers looks at AHU and says, ‘Wow, what a terrific opportunity to develop skills and grow,’ the mature workers at AHA also see AHU as a terrific tool to educate their staff and make them much more effective and efficient in what they do. The university represents a comprehensive way our workforce strategy is having a significant multigenerational impact.”

Potential for Replication

Achenbach emphasized that any workforce-related changes need to dovetail with an organization’s strategy and its culture. “Whatever size nonprofit, there needs to be some kind of grounding in the business strategy or mission of the organization,” he said. “We started down this path and every time we did something, we went back to our business strategy in order to assess if what we were doing was building muscle around the capabilities needed to achieve our mission and strategy.

“Any nonprofit can do this—it may lead another nonprofit in a very different direction than AHA’s direction. The end result may not be attending to the website or rebranding the organization.”

“What’s important,” he said, “is having the strategic planning process in place: first, identifying the mission and business strategy, connecting the dots from the business strategy to capabilities to the workforce strategy and finally to a corresponding HR strategy. Without a clearly defined business strategy, you could very well lose sight of what’s important.”

Contact Information:
Bill Achenbach
Vice President, Human Resources
American Heart Association
National Center
7272 Greenville Avenue
Dallas, TX 75231
bill.achenbach@heart.org
www.americanheart.org
March of Dimes Volunteer Leadership Institute

At a glance

Location: White Plains, New York

Mission: To improve the health of babies by preventing birth defects, premature birth, and infant mortality

Size: March of Dimes—1,170 full-time and 230 part-time employees; 3 million volunteers; $252 million in 2007 revenues

Volunteer Leadership Institute: The work of the Institute has the full support of March of Dimes President Jennifer L. Howse, Ph.D. and top volunteer leadership, who had the vision for its creation. Two staff members allocate a portion of their jobs to the institute, with additional staff support from the volunteer leadership development department and all March of Dimes functional areas. Most notably, major support comes from a corps of key chapter, regional, and national leaders, who guide the institute in all its activities.

Workforce strategy: To build capacity by reinvigorating volunteerism at the March of Dimes through consistent leadership training programs, leadership tools, and ongoing support for local chapters and divisions; to increase recruitment and retention of volunteer leaders and grassroots volunteers with the creation of a Volunteer Leadership Institute that offers online and face-to-face training and “high-tech, high-touch” initiatives for volunteer leaders.

Outcomes: Increased consistency and quality in volunteer leadership training programs, and ongoing education and support for the March of Dimes’ 3,000 local state chapter and division board members, as reflected by the tracking of its national orientation program, identified as a priority for the foundation.

Volunteerism Is Critical to the Mission

Volunteerism is part of March of Dimes’ history and tradition. In 1938 President Franklin D. Roosevelt established the March of Dimes, then called the National Foundation for Infantile Paralysis. Efforts to mobilize volunteers for the nationwide polio vaccine trials began in 1954. Nearly two million school children were vaccinated in these field trials: the largest peacetime mobilization of volunteers in U.S. history.

For the March of Dimes, developing a volunteer management strategy is a competitive imperative linked to its mission to prevent birth defects, premature birth, and infant mortality. The March of Dimes Volunteer Leadership Institute was designed to provide training and development, with the initial focus on its approximately 3,000 local state chapter and division board members. March of Dimes officials believe effective and consistent volunteer training is critical to its efforts to recruit and retain volunteer leaders.

Kathy Boggan, senior vice president of volunteer leadership development, explained the urgency of March of Dimes volunteer strategy: “Volunteerism is critical to accomplish our mission. March of Dimes needs volunteers from diverse backgrounds, skills, and ages. We have limited staff, so we view volunteers as an expansion of our human resources, particularly as the crisis of premature births continues to grow. We need more funding for research. And if we have no money for research, we have no mission. We can only succeed through the power of our volunteers.”

While its current strategy is multigenerational in approach, the March of Dimes believes the age 55-and-up boomer group presents special opportunities for the foundation. “Our primary constituency has always been ‘moms’ and we have focused our engagement efforts on that population. But many boomers are grandparents who are also passionate advocates and volunteers for our cause. In addition, boomers represent a significant portion of
March of Dimes volunteer leadership,” said Gerard E. Carrino, March of Dimes vice president for mission support and chief of staff.

In addition to the approximately three million volunteers it relies on nationally, the March of Dimes’ 3,000 volunteer leaders have key leadership roles on its chapter and division boards, which are empowered to provide localized, complementary leadership to the national board of trustees. They take local responsibility for the work and results of 51 state chapters and more than 200 divisions.

Developing a Volunteer Management Strategy

To begin developing its strategy, the March of Dimes conducted a self-assessment of its volunteerism initiatives. It held a national retreat in October 2005 for its board of trustees, board of advisors, chapter leadership, and key senior staff. It also conducted a survey to determine the quality of current volunteer leadership training programs, initiatives, and capacity. Through these efforts, the foundation discovered that within its training programs, several “pockets of excellence” had developed over the years. To retain volunteer leaders across the foundation nationally, it had to build off of these programs and make them more consistent. March of Dimes chapters have varying staff resources, so while some of the larger chapters had highly developed programs, other smaller ones did not. The organization also found that offering career paths and succession planning for its volunteer leaders could help keep individuals engaged throughout their lives as foundation volunteers.

To address these challenges and opportunities, Dr. Howse, in collaboration with the foundation’s national board of trustees, developed the vision for a Volunteer Leadership Institute, identifying long-term and short-term initiatives that would offer best–in-class training for volunteer leaders. Further demonstrating the organization’s commitment from the top to reinvigorate volunteer leadership, Dr. Howse and the board of trustees articulated the foundation’s vision statement, updating it to reflect the commitment to volunteer excellence: “The March of Dimes vision is to become recognized as the foremost champion for babies, renowned as a great organization for volunteer leaders, and certified as a highly effective and efficient philanthropic organization.”

The Institute, launched in 2006 at the March of Dimes’ national volunteer leadership conference, is described by the March of Dimes as “the coordinating structure for all future, centrally resourced volunteer leadership activities and initiatives for March of Dimes volunteers.” Its program consists of internally and externally developed training courses, best practices, and tools for chapters and divisions. Training is delivered 1) through an online platform accessible to all chapters and local offices, 2) by pairs of staff and volunteer leaders trained to facilitate workshops in the field, and 3) through the national volunteer leadership conference, which also is designed to provide consistency in its training initiatives and ongoing support for its local chapter and division board volunteers.

Each year the March of Dimes assembles between 350 and 650 volunteers at its national volunteer leadership conference to discuss best practices. However, the dissemination and application of those practices in the field depends upon how well attendees share them with their local chapters. “Again, some do it very well, so we see pockets of greatness, but it’s uneven,” said Boggan. “Now, through all of these initiatives together, we’re able to offer ongoing education and support, in addition to the one-time motivation and education that volunteer leaders receive at our annual conference.”

Blended Training Combines Online and Personal Approach

Lauren Perlmutter, director of volunteer leadership development, emphasized the Institute’s “blended training approach,” consisting of a variety of online tools, but also including in-person training. “We know that the training provided by the combined volunteer and staff teams that go directly in the field is invaluable. Nothing can replace that face-to-face personal interaction, yet today we have the opportunity to leverage technology to broaden our reach and make us more nimble.” The Institute has developed four core workshops and plans more, as part of an Executive Leadership Program focused on providing March of Dimes expertise. A faculty of 50 volunteer leaders and staff facilitates training.

- Workshop 1: Orientation is a three-part program. It includes: 1) a 21-minute DVD, “The Power is You,” which provides an overview of March of Dimes operations, 2) a new volunteer website that features a leadership orientation and resource center for chapters and one-stop shopping for relevant tools, resources
A Perfect Match? How Nonprofits Are Tapping into the Boomer Talent Pool

The Conference Board

and training programs for volunteer leadership, and 3) template PowerPoint presentations that can be customized to each chapter. Use of the orientation workshop has expanded to division boards. “We’ve put a lot of emphasis on the orientation process since we’ve found that many programs lose volunteers at the outset because they are not properly oriented to the organization,” Perlmutter said.

• **Workshop II:** Governance & Chapter Leadership addresses the relationships between the national board of trustees and chapter/division boards and the roles and responsibilities of each. It also emphasizes volunteer board-staff partnership and provides an overview of chapter board infrastructure.

• **Workshop III:** Creating Your Volunteer Leadership Plan provides local boards with the process for creating their own business plans supported by a robust volunteer leadership growth plan. The workshop emphasizes career path development’s key role in building organizational capacity.

• **Workshop IV:** Recruitment and Retention defines the volunteer cycle that links these two goals as critical elements for successful engagement and illustrates how to make volunteerism a rewarding experience. It also identifies the important role of the volunteer leadership development and nominating committee and its customized process to recruit, develop and strengthen chapter/division boards.

Engaging Volunteers: “High-Tech, High-Touch” Pilot Projects

As part of its efforts to recruit and retain volunteers, the March of Dimes is piloting a multi-faceted program in select chapters that leverages technology to market the broad reach of its mission. The program aims to build a “high-tech, high touch” infrastructure to increase the involvement of current volunteers and engage new ones. The program will cultivate year-round volunteer service, building from the successful commitment of many volunteers involved in episodic activities (such as the flagship event, March for Babies). As the volunteer corps grows from the grassroots, the March of Dimes expects that new leaders will emerge to strengthen chapter committees and boards.

Engaging retiree volunteers: the national office of the March of Dimes

When Jim Berliner, a retired J.P. Morgan executive, approached the national March of Dimes office three years ago to volunteer his services, he made it clear he was not interested in stuffing envelopes or raising money. He wanted to contribute his skills and experience. “We knew this was a great opportunity for us. So we went through a very thoughtful process of developing a position that would use his skills,” said Lauren Perlmutter, director of volunteer leadership development. The effort was well worth it.

Today, Jim Berliner volunteers twice a week, providing strategic, professional skills for the March of Dimes, including work on the three-part orientation program and other web resources of the Volunteer Leadership Institute. In addition, his wife, Sari Berliner, a former professional recruiter, contributes valuable volunteer services as the in-house volunteer recruiter. Perlmutter estimates that Sari Berliner’s efforts, which included recruiting more than 50 volunteers in the national office in the last six months alone, resulted in more than 10,000 volunteer hours—the equivalent of about $200,000 worth of service as estimated by the Independent Sector.

There has been a generational ripple effect: Their 41-year-old daughter has become a volunteer at the March of Dimes California chapter, and their 13-year-old grandson completed a three-week summer internship doing research at the national office in White Plains, New York. “It was a wonderful reflection of the power of different generations being engaged in valuable community service,” said Perlmutter. The Berliners are not alone; other retired seniors have contributed their services at the March of Dimes headquarters.

“We believe that engaging retirees in meaningful volunteer positions is the kind of behavior that our national office should be modeling to our chapters across the country,” notes Kathy Boggan, leadership development senior vice president.
The pilot programs include a variety of initiatives:

- New systems—Vital volunteer data are collected and managed electronically.
- New volunteer web site—(www.marchofdimes.com/volunteerland) provides self-service orientation and volunteer activities as another avenue to boost engagement.
- Social networking—The March of Dimes uses resources such as its Share Your Story website and its Team Youth website to generate volunteer activity and respond to volunteer needs and interest.

The March of Dimes focuses on using these initiatives to connect individuals to volunteer opportunities at local chapters and divisions. A volunteer-to-volunteer approach, which takes into account a volunteer’s passion, skills and interests, engages individuals and places them in appropriate roles.

Lessons Learned

In developing and implementing these efforts, the March of Dimes has identified several critical success factors:

- The March of Dimes creates the forum for individuals to volunteer, whether in-person or online. Yet it realizes that its volunteers have to drive these efforts based on their interests and expertise.
- The agency has an opportunity to build on the flexibility that technology provides in engaging volunteers.
- A peer-to-peer (volunteer-to-volunteer) approach is extremely effective, particularly in recruitment, retention and building the overall motivation and engagement of volunteers.
- A consistent orientation program leads to success.
- While core training sessions and workshops can be used to create consistency throughout an organization, the programs must be customized to meet the varied needs of individual chapters and divisions.

Contact Information:
Kathy Boggan
Senior Vice President of Volunteer Leadership Development
March of Dimes
1275 Mamaroneck Ave.
White Plains, N.Y. 10605
kboggan@marchofdimes.com
www.marchofdimes.com
www.marchofdimes.com/volunteerland
Summary of Practical Implications

How to Help Workers Transition Successfully into the Nonprofit Sector

• When interviewing, ask boomer applicants how their for-profit accomplishments would benefit your nonprofit needs. Look for people who can express those benefits.

• Match skills with responsibilities and focus on transferable skill sets. But be prepared to think out of the box by remaining open to creative ways to apply business skills.

• Design jobs to ensure a clear connection between people’s work and the outcomes. Switchers, many of whom come from large bureaucratic corporate or government organizations, haven’t seen that connection.

• Highlight positive work-related outcomes and recognize people at staff meetings and other events to reinforce their contributions.

• Tap the knowledge of boomers and experienced workers in your organization who have already switched from for-profit or government careers.

Companies that walk the walk

JEVS Human Services
Alpert Jewish Family and Children’s Service
Generations Incorporated

How to Use Various Pathways to Nonprofit Jobs, Such as Connectors, Volunteer-to-Paid, and Corporate Programs

Third-party connectors:

• Offer a cost-effective solution for nonprofits by screening, assessing, and placing mature adults in critical capacity-building roles.

• Assist mature adults by finding suitable opportunities in social purpose jobs that match their skills and experience.

• Work closely with organizations and individuals to assure a good fit for both.

Volunteer-to-work pathways:

• Offer mature adults the opportunity to gain skills and experience in an unpaid volunteer position as a steppingstone to a paid position.

• Provide nonprofits a source of in-house talent rather than recruiting new employees.

• Provide mature adults flexible hours, training, stipends, and professional support.

• Fulfill vital community services.

Corporate pathways:

• Enable companies to help their mature workers launch new social purpose careers.

• Benefit companies by increasing employee morale, strengthening market position, and building strong community relations.

• Provide nonprofits a source of highly qualified and committed boomer talent.

Companies that walk the walk

Reserve Elder Service, Inc. (connector)
IBM Transition to Teaching (corporate program)
AJFCS’ Enhanced Companion (volunteer-to-work program)
How to Create Flexible Work Models that Benefit Both Employees and Employers

- Focus on results, not hours worked. If work is not getting done, a manager can intervene.
- Emphasize open communication, trust, and accountability.
- Adopt tools for flexibility that meet organizational and personal needs. Examples: telecommuting, compressed work weeks, part-time and flexible hours.
- Be prepared to manage flexibility in multigenerational workforces, addressing needs of mature and younger workers.
- Provide training and continuous learning opportunities to support flexibility and employee growth.
- Create flexible approach to benefits, pay, and job roles. Examples: informal phased retirement, teamwork, part-time management roles, paid (or stipended) time off, transportation passes, and pay-per-client plans.

Companies that walk the walk

Community Council of Greater Dallas
Generations Incorporated
Alpert Jewish Family and Children’s Service

How to Establish Effective Professional HR Management

In large nonprofits:

- Use a talent management approach to link HR and workforce strategy to the business strategy or mission of the organization.
- Use a participative, cross-functional process in developing key recruitment and retention tools.
- Invest in professional development as a way to engage current employees, young and old, and attract new ones.
- Link learning to personal and organizational goals.

A company that walks the walk

American Heart Association

In small- to mid-size nonprofits:

- Explore collaboration with other nonprofits to negotiate better health benefits.
- Tap federal and pro bono local resources, such as the federal Senior Community Employment Program (SCEP); VISTA, the federal domestic Peace Corps program; and The Legal Aid Society.
- Join national and local human resource associations, such as Society for Human Resource Management.
- Take advantage of resources offered by your national nonprofit membership association.

Companies that walk the walk

Community Council of Greater Dallas (member of National Association of Planning Councils)
Alpert Jewish Family and Children’s Service (member of Alliance for Children and Families)
Generations Incorporated

How to establish new models of volunteerism:

- Rethink volunteerism as a critical first step toward a strategic volunteer engagement approach.
- Combine online and face-to-face training approaches to recruit and retain both grassroots volunteers and volunteer leaders.
- Consider a “volunteer-to-volunteer” approach to build recruitment, motivation, and retention of volunteers.

A company that walks the walk

March of Dimes’ Volunteer Leadership Institute
About the Author and Contributor

Jill Casner-Lotto is a writer and research consultant with over 20 years’ experience in human resources and labor-management issues. Her current research at The Conference Board focuses on the mature workforce in the nonprofit sector and the workforce readiness of new entrants. Previous to her consulting work with The Conference Board, Casner-Lotto was senior vice president for policy studies at Work in America Institute, a nonprofit workplace research organization. She has directed numerous research projects and has written policy study reports on such topics as managing and training for new technology, high performance workplaces, teamwork, labor-management relations, work-life effectiveness and job-linked literacy.

Diane Piktialis, Ph.D. is a Research Working Group and Program Leader at The Conference Board, where her work focuses on multigenerational and aging workforce issues. She has more than 30 years of experience in program and product development. Piktialis was formerly Work-Life Product Director and an expert on mature workers at Ceridian Corporation. Prior to that, she was Vice-President at Work/Family Directions where she created the first U.S. corporate elder care program.

About this Report

This report is based on The Conference Board 2008 Employer Survey on Transitions into the Nonprofit Sector, as well as research conducted on behalf of The Conference Board Research Working Group on Managing an Aging Workforce at Nonprofits. This group represented a variety of organizations: local, regional, and national nonprofit employers; connectors, or intermediary firms, that place mature workers in nonprofits; national affiliate membership organizations, and a foundation. The aging workforce was an immediate or emerging issue for many members.

The survey results include the views of 151 nonprofit employers, 65 “sector switchers”—mature workers age 50 and over—who have made the switch to nonprofits, and 100 job seekers, also age 50 and over, interested in switching to nonprofit positions. Respondents self-selected into the survey and therefore do not represent a random national sample.

The report also features nine full-length case studies of companies that represent a range of size and type: small, medium, and large nonprofits; local and national organizations; geographically diverse nonprofits; a variety of social service missions (education, vocational services, and health and human services); and include both employers and connectors.

To learn more about The Conference Board Research Working Groups, contact Wim Overmeer at 212-339-0332 or by e-mail at willem.overmeer@conference-board.org

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Publications Team

Publishing Director Chuck Mitchell
Research Director Linda Barrington
Editors Susan Stewart, Megan Manni
Design Peter Drubin
Production Pam Seenaraine
Managing an Aging Workforce in the Nonprofit Sector
Research Working Group Members

Ms. Carol Trager  
Director of Marketing  
Bridgestar

Mr. Cal J. Halvorsen  
Program Associate  
Civic Ventures

Ms. Phyllis N. Segal  
Vice President  
Civic Ventures

Dr. Robert Grimm  
Director of Research & Policy  
Development & Sr. Counselor to the CEO  
Corp. for National and Community Service

Ms. Jan Newsome  
Special Assistant to the CEO, Strategic Initiatives: Harnessing Baby Boomers’ Experience  
Corp. for National and Community Service

Ms. Virginia Cruickshank  
Senior Vice President - Employment, Training, Education & Youth Services  
F E G S Health and Human Services System

Mr. Ira Machowsky  
Executive Vice President  
F E G S Health and Human Services System

Mr. Michael Watson  
Senior Vice President, Human Resources  
Girl Scouts of the USA

Ms. Deborah Williams  
Manager, Human Resources Initiatives  
Girl Scouts of the USA

Ms. Diane Posternack  
Vice President, Human Resources  
JEVS Human Services

Ms. Marian Baldini  
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National Human Services Assembly

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Former Executive Director  
Reserve Elder Service, Inc.

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Program Officer  
Reserve Elder Service, Inc.

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Deputy Director  
Reserve Elder Service, Inc.

Ms. Sandra Bass, Ph.D  
Program Officer  
The David & Lucile Packard Foundation

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Assistant Vice President  
United Way of Greater Houston

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