

NAPC

Mature Workers

Initiative

Consolidated Report - February 2009



National Association of Planning Councils

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Introduction

*Martha Blaine, Chair, NAPC Mature Workers Initiative
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According to Marc Freedman, the founder/CEO of Civic Ventures and the author of “Encore: Finding Work that Matters in the Second Half of Life”, baby boomers are inventing a new phase of work. It’s one of the most significant trends of the new century, and the biggest change in the American workforce since the women’s movement. As their numbers begin to swell, these individuals hold the potential to transform work in America – and create a society that works better for everyone.

Attendees at the May 2008 Annual Conference of the National Association of Planning Councils participated in a session discussing this emerging trend, how it will affect employment and leadership in nonprofit organizations, and the roles planning councils can/do play in their communities related to this issue. Member organizations signed up to share information about the activities of their planning councils and the varied efforts already starting in their communities related to the recruitment and retention of mature workers. NAPC participated in The Conference Board Working Group on Managing an Aging Workforce in Nonprofits. In September 2008, NAPC and the Community Council of Greater Dallas co-hosted a “sounding board” session conducted by Phyllis Segal, Vice President of Civic Ventures; NAPC Board members and Dallas leaders learned about their national survey of nonprofit employers.

As the movement gathers traction and more boomers seek employment and volunteer opportunities in the nonprofit sector, we hope to share information about their goals, aspirations, and the processes they use to find, connect to, and maintain opportunities for “purposeful” work and engagement.

NAPC Members participating include:

- Community Action Network – Austin, Texas
- Community Council of Greater Dallas – Dallas, Texas
- Community Planning Council of Yonkers – Yonkers, New York
- Community Service Council – Tulsa, Oklahoma
- Community Services Planning Council – Sacramento, California
- Council of Community Services – Roanoke, Virginia
- Jacksonville Community Council, Inc. – Jacksonville, Florida
- LINKS Community Collaborative – Scottsdale, Arizona
- Planning Council for Health & Human Services – Milwaukee, Wisconsin

Participating Organizations and Activities

Community Action Network

Austin, Texas

Mary Dodd reporting

In Austin, the Community Action Network (CAN) works with a wide variety of community agencies. CAN reports that the Austin nonprofit organization Greenlights for Nonprofit Success has begun offering consulting services for Executive Transitions at nonprofit agencies. Research suggests that many Executive Directors will be stepping down in the near future. In a survey of Central Texas nonprofit executives, Greenlights found that two-thirds of current executives plan to leave their positions within five years. Fewer than half of Central Texas nonprofits have a formal succession plan, and few seek outside assistance during their transitions.

Greenlights has developed, with the support of the MFI Foundation, a set of resources to help nonprofits through their executive transitions. Greenlights complete Executive Transition Management service includes:

- Placing an Interim Executive Director to maintain high quality services
- Assessing the current organization to understand leadership priorities
- Guiding the search process through creation of a transition committee
- Supporting the Interim Executive Director and the board throughout the transition
- Providing hands-on guidance for the board from experienced consultants
- Coaching the board and new Executive Director through the onboarding process

Community Council of Greater Dallas

Dallas, Texas

Martha T. Blaine reporting

The Community Council of Greater Dallas (CCGD) is also the home for the Dallas Area Agency on Aging. As such, it is involved in many aspects of the planning and delivery of services for persons aged 60+. Not only has CCGD been studying various aspects of the graying of America, it is witnessing the aging of its own staff, with 80% of its senior leadership team over the age of 52, and 40% over age 62.

In 2008 CCGD twice convened a preliminary task force of Dallas regional leaders who are also interested in this rapidly growing trend. This task force included the Executive Directors of the Volunteer Center of North Texas, the Center for Nonprofit Management, the Senior Source (aka Senior Citizens of Greater Dallas); an adjunct professor from the University of Texas Arlington; the Director of the Nonprofit Management Program at the University of Dallas; the Vice President of the Dallas Regional Chamber of Commerce; an executive recruiter specializing in older workers; and the administrator of the National Association of Planning Councils.

This group met to review the recently published research from the Conference Board and Civic Ventures on recruitment and retention of older workers, and to begin discussions of emerging best

practices for linking individuals wishing to switch sectors into a nonprofit career with nonprofits seeking their skills and experience.

The next meeting of this group will include an expanded list of attendees, seeking to enlarge the circle of participation and to begin to delve into best practices from around the country.

In addition to the meetings of its task force, CCGD and NAPC were honored to co-host a “sounding board” session conducted by Phyllis Segal, Vice President of Civic Ventures, in September 2008. She presented the preliminary findings of the Civic Ventures survey of nonprofit employers, and sought feedback on several issues from Dallas attendees. Martha Blaine attended the 2008 Purpose Prize Winners and Encore Careers Summit presented by Civic Ventures in California in mid December.

Community Planning Council

Yonkers, New York

Greg Arcaro and Cathy Elser reporting

The Mature Worker Initiative of the Community Planning Council of Yonkers is known as “55Plus”. Directly and in partnership with other organizations, it presents programs to increase leadership, social, educational, work, and volunteer opportunities for the 47,000 older adults in Yonkers. 55 Plus offers free community leadership training, transitional planning sessions, annual educational community forums, a senior health and fitness day, and a newsletter reaching over 17,000 residents. The Program recently held its 7th Annual Community Forum covering topics such as mental fitness, avoiding scams, aging-in-place, and travel for mature adults.

Annually, the Program partners with the Mayor of Yonkers honor older adults in the community who volunteer their time to improve the quality of life in the city. It also partners with the Yonkers Chamber of Commerce to recognize those businesses in Yonkers that provide extra services or facilities for older adults. 55Plus is led by a Board of Directors and has a membership of over 350. For more information about 55Plus, visit its website at www.55plusyonkers.org.

Community Service Council

Tulsa, Oklahoma

Phil Dessauer, Jr. reporting

Tulsa has convened an “Age Wave” group, which is currently focusing on housing and long term care. The growing assumption is that most people are going to continue working until at least seventy. Tulsa will take a closer look at mature worker issues in early 2009.

Community Services Planning Council

Sacramento, California

Nancy Findeisen reporting

The Community Services Planning Council (CSPC) recently completed a regional research project, the Capital Region Healthy Futures Project. The project's purpose was to identify key health, social, and economic indicators affecting a nine-county region in the greater Sacramento, California area. One of the key trends identified for the region is the aging of the population. Current focus is on the mature workforce in Sacramento County.

According to the Healthy Futures report, in 2005 20% of Sacramento County's population was 55 years of age and older. The 55+ age group is expected to jump from 278,000 in 2005 to 445,000 in 2020. The Council is beginning to bring together various programs to discuss how to utilize this extraordinary resource that is growing in the Sacramento community. A meeting with the Nonprofit Resource Center to discuss the Mature Workforce Initiative is upcoming.

Council of Community Services

Roanoke, Virginia

Pam Kestner-Chappelear reporting

The Council of Community Services is facilitating the Mature Workers' Initiative in the Roanoke Valley, Virginia region. The Council will be forming a steering committee to guide the development of this initiative and will recruit representatives from the Nonprofit Resource Center (NRC) of Western Virginia and the Senior Citizen Coordinating Council (SCCC) to serve on the steering committee. Both the NRC and the SCCC are very interested in this initiative and have agreed to be involved in its development and implementation.

The NRC plans to host a series of workshops focused on succession planning for nonprofits. A goal is to incorporate workshops on recruiting those who have retired from the for-profit sector into the nonprofit sector.

Jacksonville Community Council, Inc. & United Way of NE Florida

Jacksonville, Florida

Ben Warner reporting

Thirty five community leaders representing more than 16 profit and nonprofit organizations have been planning a mature workers initiative called **Civic Engagement: Moving Seniors toward Paid and Unpaid Work**. The initiative will assist seniors who want to work full-time, reduce their hours of paid work, or increase their volunteer opportunities. The overall aim is to prevent disengagement of seniors in Jacksonville so they remain physically active and socially connected.

In 2008, United Way of Northeast Florida hosted a visit by Marc Freedman, founder of Civic Ventures. He met with community leaders interested in "encore careers" and social entrepreneurship. Following

the visit, the Civic Engagement group developed a 24-month implementation plan involving three objectives: 1) catalyze 50 business and nonprofit leaders to create organized change; 2) create a local “road-map” of placement and training resources for seniors seeking paid and unpaid work; and 3) develop a Senior Advisory Group to facilitate future funding, learning, and evaluation of efforts.

Deliverables expected from the Civic Engagement initiative include a self-assessment toll for businesses and nonprofits to evaluate their workplace preparedness for mature workers; implementation of a new recruitment or hiring/retention practice among at least 50 Jacksonville organizations; and a web-based inventory of local resources for seniors and organizations seeking mature workers and volunteers.

Civic Engagement leadership participated in the Civic Ventures Encore Career Summit in December 2008 and participates in a learning network with ReServe in New York, N.Y.

LINKS Community Collaborative

Scottsdale, Arizona

Judy Crider reporting

The mission of LINKS is to promote solutions to local public policy issues that lead to a productive community where all individuals, families and businesses have the opportunity to achieve their full potential. LINKS accomplishes its goals by working with community partners. One such partner is the Scottsdale Boomerz project, a community collaborative dedicated to helping public and private organizations think differently and creatively about how to capture and involve the boomer generation in increased civic engagement in the greater Scottsdale area.

Boomerz partners include nonprofits, schools, governmental organizations, and companies. Primary partners include the Scottsdale Unified School District, the City of Scottsdale (Neighborhood Resources and Public Library), Scottsdale Community College, and Scottsdale Healthcare.

Boomerz believes that boomers -- even as they age -- can be an ever-increasing asset to society rather than a liability, and is committed to making this concept a reality. Five goals were established to address the challenge:

1. Increase the number of boomers in meaningful nonprofit and government volunteer positions
2. Build the capacity of nonprofits for sustainability
3. Encourage profit and nonprofit organizations to create a new work paradigm that will produce flexible re-careering opportunities for boomers who need and want to work
4. Reach a broad range of individuals and organizations in the greater Scottsdale community with Boomerz programs and services
5. Develop an increasingly effective and sustainable organization

This project has accomplished a great deal in a relatively short time. Here are examples of some of their accomplishments:

- Held two “How to Make Your Volunteer Program Boomer-Friendly” workshops attended by more than 75 executive directors and volunteer coordinators
- Held three “Get Involved! Expos” attended by more than 500 potential volunteers; 22% of boomers in attendance accepted volunteer positions as a result
- Applied for grant funding for a Social Entrepreneurs’ Center (SEC)
- Held three “Human Resource Workshops” attended by more than 100 human resource personnel

- Held six Talent Acquisition Coffees in three months, with a total of 200 people attending
- Hosted the first “Boomerz Job Fair” with 70 companies and 1200 job seekers attending
- Developed a specialized Job Bank for baby boomers which allow companies to delineate their boomer-friendly characteristics and allows boomers to describe the kind of position they are seeking
- Held a “Finding Your Passion and Purpose” seminar for 200 residents, featuring three boomers who have re-careered

One of Boomerz’ partners, The Center for Workforce Transition at GateWay Community College, is offering skill assessment and training for both paid and unpaid work in healthcare, education and social services.

Scottsdale Boomerz is part of a larger Next Chapter Initiative sponsored by the Virginia G. Piper Charitable Trust.

For more information visit: www.BoomerzAZ.com

Planning Council for Health & Human Services

Milwaukee, Wisconsin

Pat Linnane reporting

The Planning Council for Health and Human Services, the Nonprofit Center of Milwaukee, the Helen Bader Institute for Nonprofit Management, and BoardStar are all interested in playing a role as a community partner in the maturing workforce initiative in Milwaukee. *Jobs that Serve* is a program of the Milwaukee Nonprofit Center. It is a web based matching system for nonprofits seeking to fill positions in their agencies and individuals seeking employment in the nonprofit sector. While it is open to any adult seeking employment, there is an interest in designing a targeted focus on baby boomer retirees supported by a strong research and evaluation component.

The Planning Council, Helen Bader Institute and BoardStar are interested in assisting with the development, overall design and implementation of targeting baby boomer retirees with *Jobs that Serve*.

The coordinated concentrated efforts of these Milwaukee organizations would address and examine how best to prepare and connect baby boomer applicants to nonprofit service and employment, as well as preparing supportive nonprofit organizations. Among the issues to be addressed are personnel policies, recruitment and retention practices, and methods to leverage the wealth of knowledge and experience of baby boomer retirees within the context of the culture of individual nonprofits.

This project would welcome input from other communities, and the opportunity to share its experience and findings with all stakeholders in the larger initiative. Products expected to come from this project include:

- Training curricula
- Exemplary practices templates
- Corporate tool kits targeted to Human Resource Managers