



2007 MetLife Foundation/Civic Ventures **BreakThrough Award**

SHOWCASING ORGANIZATIONS THAT TAP THE PASSION
AND EXPERIENCE OF PEOPLE OVER 50 TO IMPROVE SOCIETY

MetLife Foundation



The nation today
faces breathtaking
opportunities disguised
as insoluble problems.

John Gardner

2007 MetLife Foundation/Civic Ventures
BreakThrough Award

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Foreword

Marc Freedman



In one of the most significant social trends of the new century, and the biggest transformation of the American workforce since the women's movement, members of the baby boom generation are inventing a new phase of work. If the old golden years dream was the freedom from work, the dream of this new wave is the freedom to work—in new ways, on new terms, to new and even more important ends.

As we discovered in a national survey supported by the MetLife Foundation two years ago, half of those between the ages of 50 and 70 want encore careers—jobs that offer not only continued income but the promise of more meaning and the chance to do work that means something beyond themselves. Sadly, few over 50 thought jobs at the intersection of income and impact would be easy to find.

That disconnect is troubling, especially in light of today's human resource needs in education, health care, social services, nonprofit leadership, and government. Still, few nonprofit and public sector employers are actively searching out experienced people who want new careers helping others.

All of the BreakThrough Award winners are finding that experienced employees can help organizations do an effective and efficient job of delivering on their missions.

But there are some notable and significant exceptions. In this report, we introduce you to ten remarkable organizations, all tapping the passion and experience of those over 50 to improve society. Some are employers, offering new jobs, flexible options, and creative incentives to recruit and retain experienced employees. Some are organizations that have sprung up as social purpose employment agencies, connecting those over 50 with jobs for the greater good.

But all of the BreakThrough Award winners are finding that experienced employees can help organizations do an effective and efficient job of delivering on their missions.

I hope you enjoy reading the stories in the pages ahead but, more important, I hope these stories spur other organizations to, if you'll permit the paraphrase, go forth and replicate. There are great and simple ideas here. And there are millions of boomers who say they'd like to work for the greater good. Let's match unmet human needs with untapped human resources. The result will most certainly be a win-win of staggering proportions.

On behalf of Civic Ventures, I'd like to thank the MetLife Foundation for its generous support, which made the BreakThrough Award possible. Specifically, I'd like to thank Sibyl Jacobson, president and CEO of the MetLife Foundation, and Barbara Dillon, program manager, for their vision and, most important, for their commitment to both knowledge and action.

While we had a great deal of help in establishing the BreakThrough Awards, I want to single out a few people who were instrumental: Linda Barrington and Diane Piktialis of The Conference Board; Ellen Galinsky of the Families and Work Institute; Max Stier, John Palguta, Bob Lavigna, and Vicki Novak of the Partnership for Public Service; Susan Hassmiller and Barbara Hatcher of The Robert Wood Johnson Foundation; Marcie Pitt-Catsoupes of the Center on Aging and Work at Boston College; Joy Cameron of the National Governors Association; and Paul Thornell of The United Way.

Finally, I'd also like to thank our panel of judges, named below. They lent tremendous experience, expertise, and enthusiasm to this project. ■

Marc Freedman is the founder and CEO of Civic Ventures and author of *Encore: Finding Work That Matters in the Second Half of Life* (PublicAffairs Books, 2007).

2007 BreakThrough Award Selection Panel

Rex D. Adams

Selection Panel Chair

*Dean Emeritus of the Fuqua School of Business at Duke University
and Fellow of the National Academy of Human Resources*

Ann S. Bowers

*Chair of the Board of the Noyce Foundation and former Vice
President of Human Resources for Apple Computer*

Rosabeth Moss Kanter

*Ernest L. Arbuckle Professor of Business Administration, Harvard
Business School and former editor of the Harvard Business Review*

Martin W. Rodgers

Partner, Accenture, a global management consulting firm

David Simms

*Managing Partner of Bridgestar and former CEO/COO of the Red
Cross Book Services Region in Washington/Baltimore*

Jeanette C. Takamura

*Dean of the Columbia University School of Social Work and former
Assistant Secretary for Aging, U.S. Department of Health and
Human Services*

Three Fast Facts

MetLife Foundation/Civic Ventures New Face of Work survey results, 2005

1 Half of all Americans age 50 to 70 want work that helps others.
A full 50 percent are interested in taking jobs—now and later—that help improve quality of life in their communities.

What kind of work do those age 50 to 70 want to do? Two out of the three types of work mentioned most often were good work jobs in education and social services.

Baby boomers are ahead of the curve: 58 percent of those age 50 to 59 are interested in these “good work” jobs, with 21 percent saying that they’re very interested.

2 Encore careers are about people, purpose, and community.
Americans planning to work in traditional retirement years will pursue second careers that provide income. They also have a high level of interest in work that helps improve their community. But two other motivations are vitally important:

59 percent say staying involved with other people is very important in attracting them to a job in retirement.

57 percent say it’s very important that the job give them a sense of purpose.

Women boomers top the list: 70 percent of females age 50 to 59 say it is very important that a job in traditional retirement years give them a sense of purpose.

3 Many think it won’t be easy to find second careers doing good work and strongly support public policy changes to remove obstacles.
Nearly half (48%) of Americans age 50 to 70 think it may be difficult or very difficult to find good work.

48 percent strongly support increasing funding for Americans who go back to school or who get training to prepare for work in schools or social services.

46 percent strongly support a grant or tax credit for Americans over age 50 who spend a year in training for community service or actually working in a job in public or community service.

Tax credits are desirable: 60 percent strongly support giving a tax credit to older Americans who work in schools or social services.

The Tip of a Wave

Rosabeth Moss Kanter

Whether they know it or not, the BreakThrough Award winners are at the vanguard of a rare historical opportunity: They are helping to invent a new stage of life. That might sound grand, but consider this: Life stages involve physical realities, of course, as people are born, develop, grow, and age, and stages are solidified by family patterns such as parenting or grandparenting. But life stages are also social constructions, based on our collective expectations for what people should be doing at various ages (“adolescence” is a recent invention) and what opportunities they have to contribute. Assumptions about age-appropriate behavior go far beyond physical capacity.

The aging of America represents a demographic shift of massive proportions. With an elongated lifespan and healthy aging, today’s and tomorrow’s maturing Americans will often enjoy two or three productive decades of life following the time that social convention once identified as “retirement.” What will be our definition of this stage of life?

Will it be a second childhood of leisure and self-indulgence, as depicted in commercials for cruises and theme parks or envisioned by developers of golf resorts? Or will it be a time for service, for giving back, as so many Americans indicate on surveys that they want it to be?

Does advancing age mean an end to learning, so that new knowledge and innovative thinking must come from the young? Or can learning truly be life-long, as boomers match experience to new opportunities and seek “encore careers,” in Marc Freedman’s felicitous term?

Will maturing adults be thought of only as needy recipients of services, consuming societal resources? Or can they be seen as givers of services, providing additional human resources to improve communities?

These questions can represent false choices, as the BreakThrough Award winners make clear. For example, organizations such as the Allied Coordinated Transportation Services and the Nursing Home Ombudsman Agency of the Bluegrass provide peer-to-peer services, showing that needs and solutions co-exist among mature Americans. As the pool of elderly needing services expands, so does the pool of healthy elder peers available to help, whether as their advocates in nursing homes or their drivers in rural neighborhoods.

Another winner, Cleveland Metroparks, shows that outdoor experiences without golf clubs can co-exist with productive work. And health systems, like Leesburg Regional Medical Center and The Villages Regional Hospital, demonstrate the value of keeping experienced care providers, who can refresh their knowledge at any age.

Civic Ventures, home of the BreakThrough Award, is dedicated to the proposition that the new later-stage of adult life should be defined by social purpose work. That’s why this award focuses on nonprofit organizations and how they might ride the wave to improve their own ability to serve.

Will it be a second childhood of leisure and self-indulgence, as depicted in commercials for cruises and theme parks or envisioned by developers of golf resorts? Or will it be a time for service, for giving back, as so many Americans indicate on surveys that they want it to be?

Nonprofit organizations operate in the areas of greatest societal need, in defining society. Quality-of-life services such as education, religion, health care, arts, and community-building are sources of meaning as well as caring. The human touch-points in human services can't be off-shored, downsized or replaced by technology. Although medical tests from Indiana can be analyzed in India, caregiving cannot become remote without losing something vital.

People living longer inevitably want to focus on things that make life worth living. They want to be connected to other people; they want to feel that their presence matters; they want to feel that they are still learning, because knowledge is one way to progress rather than deteriorate—in short, what I call the “three Ms of motivation”: mastery, membership, and meaning. The fourth M of money plays a declining role once basic needs are met, although many older adults also need earned income.

Long an American specialty, nonprofit community action is a source of both social connections and social solutions. It fills gaps where business and government don't quite meet every need.

Leadership from civil society is especially vital today, when a common ailment for Americans of all ages is not physical pain but an eroding sense of community. In recent years, the evidence has mounted about the loss of traditional “social capital” in America—that dense network of relationships that connect people to opportunities, information grapevines and shared purpose. In 20 years, between 1985 and 2004, the number of people who have no one to talk to doubled, and the number of confidants of the average American declined from three to two, a national survey by Duke sociologists showed.

Making sure that nonprofit and human service organizations can thrive is as important as ensuring that an aging population remains connected and motivated. The nonprofit sector covers a wide territory in terms of size and managerial sophistication, from giant hospital systems with thousands of employees all the way to storefront community centers, but what they have in common is a growing shortage of people to fill their jobs, a problem particularly acute in health care and shared by their public sector cousins in K-12 education.

Leadership from civil society is especially vital today, when a common ailment for Americans of all ages is not physical pain but an eroding sense of community.

Some of the BreakThrough Award winners recognize that they cannot continue to serve without finding ways to attract and retain experienced professionals and staff that might want a different work-style after years of intense toil. Those organizations were meeting their own needs for talent, but through self-interest came innovations in meeting the needs of an aging workforce, such as highly flexible schedules and special training opportunities.

Not all nonprofits are sufficiently sophisticated to seek innovative solutions even to their own needs, let alone the promise of an experienced workforce. A report from The Conference Board includes a strong indictment of nonprofits for neglecting human resource capacity-building in general, let alone showing interest in improving their deployment of mature adults. Even with a potential supply of mature talent, is there a demand?

Changing the composition of the workforce often requires organization change. Flexible work hours, grandparenting leave, or how to mix use of well-honed skills with opportunities to learn new things are only a few of the policy issues nonprofit organizations might encounter. The fact is, some nonprofits and some younger workers might not like experienced people poking around in their affairs. Organizational culture might also have to change—as part of defining a new life stage.

The other important change is to find pathways to match employers and potential encore careerists, especially for those who want to change careers. One of the BreakThrough Award winners, ReServe Elder Service, provides a model for matching to produce community benefits.

Making a match is only one step; education and training are often required. Another award-winner, Troops to Teachers, shows how to help one population of leaders take the discipline and focus gained in the military to the classroom, in a win-win model. Role models are one way to stimulate change, especially if we understand that they are just the start of a wave that can swell if we start to equate “senior” with “social purpose contributor.”

Whatever we do to put older adults to work, it can't be “make-work.” Embracing the potential of the maturing population is pragmatic; it will meet organizational and societal needs—especially if the maturity and wisdom of decades of experience are truly valued. In a youth-obsessed nation, that can seem daunting. But the very diversity of the BreakThrough Award winners shows that change can spring up anywhere in America, wherever enlightened leaders understand that human potential is nearly endless, but that organizations have to change to tap it. ■

Embracing the potential of the maturing population is pragmatic; it will meet organizational and societal needs—especially if the maturity and wisdom of decades of experience are truly valued.

Rosabeth Moss Kanter holds the Ernest L. Arbuckle Professorship at Harvard Business School. Her newest book, *America the Principled: 6 Opportunities for Becoming a Can-Do Nation Once Again*, will be published by Crown in October 2007.

Allied Coordinated Transportation Services, Inc.

Joe Petrucci, a former independent trucker in western Pennsylvania, used to transport steel. Today, at 77, he earns union wages 25 hours each week, driving chemotherapy patients to doctor's appointments, older adults to grocery stores, and children with low-income working moms to daycare.

Petrucci is one of about 20 drivers—all over 50—who work for a unique, publicly-funded social services program called Allied Coordinated Transportation Services (ACTS). Represented by Teamsters Local 261, the drivers earn \$9 an hour, accumulate sick and vacation leave, and can choose to work between 10 and 40 hours each week.

Last year, ACTS drivers provided 92,000 trips for 1,158 qualified riders.

Launched in 1983, ACTS receives 85 percent of its budget for senior citizen trips from the Pennsylvania Lottery, which targets proceeds to programs that help older state residents. Riders pay the difference in \$1 and \$2 fares. For those who can't afford to pay, fares are fully subsidized.

“The drivers are so nice. They're wonderful—like old friends.”

Petrucci, who has been driving with ACTS for two years, enjoys the work. “It's a way of helping others,” he says. “Many of our riders have nobody; we're somebody they can talk to going to and from the grocery or doctor.”

And the extra income doesn't hurt. “Social Security doesn't go as far as it used to,” Petrucci says, “so the money I make helps to pay for health insurance, gas, things like that.”

Tom Scott, CEO, says: “The age of our drivers makes a difference to our riders, most of whom are over 65. Older drivers have a particular empathy with those individuals, and our clients—young and old—feel comfortable with them.”

Rose Pognatso can attest to that. At 80 and no longer driving—typically a big concern for those aging in rural areas—Pognatso gets a ride to doctors appointments from ACTS drivers twice each month. “The drivers are so nice,” she says. “They're wonderful—like old friends.”

Despite its small size, the program has not gone unnoticed. In 2006, the Pennsylvania Department of Aging named ACTS the Small Employer Champion of Older Workers for its efforts to recruit and retain older workers. ■



Photos by Jim Nocera, Portraits Plus

Above: ACTS driver Dan Malley, Jr. escorts rider Colleen Stelter to her appointment. Right: As an ACTS driver, Nancy Voras is one of many people over 50 helping to provide over 90,000 trips annually.

at a glance

Location

Lawrence County, Pennsylvania

Mission

To provide door-to-door transportation services for older adults, the sick and disabled, and children whose mothers are in welfare-to-work programs

Workforce strategy

To employ experienced older adults as drivers

Number of employees

About 20, all over 50 years old

Impact

In 2006 ACTS provided 92,000 trips for 1,158 qualified riders

Value of experience

A stable workforce of older adults who have experience behind the wheel provide consistent support and empathy to clients, and appreciate the opportunity to give back to the community

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Leesburg Regional Medical Center and The Villages Regional Hospital

When it comes to the shortage of health care professionals, there are *national* numbers: The American Hospital Association estimates that 118,000 registered nurses are needed to fill vacancies at U.S. hospitals now. By 2010, experts estimate a shortage of up to 1 million licensed practical nurses. The Bureau of Labor Statistics expects demand for more than 1 million new health professionals between now and 2014.

And then there are *local* numbers, measured in vacancy and turnover rates, as health care facilities try to cope.

Leesburg Regional Medical Center and The Villages Regional Hospital (LRMC/TVRH) in central Florida is proud of its numbers. After a five-year effort to recruit and retain health care staff over 50, the facility boasts vacancy rates of just 5 percent, a turnover rate for registered nurses of 9 percent, and an overall turnover rate of less than 15 percent.

The benefits of a stable, experienced staff are clear. An older workforce, in the heart of retirement country, “matches our patient population,” explains Darlene Stone, the medical center’s vice president of human resources. “Plus, we value their work ethic. They are reliable, committed, loyal and methodical, which is especially important in health care because it results in fewer errors.”

Since the decision five years ago to boost retention and recruitment of older employees, as LRMC/TVRH was opening a new hospital that needed to be staffed, it has increased the percentage of employees over 50 from 33 percent to 42 percent. As Stone says, “We’ve never looked back. From the CEO on down, there is a commitment to showing more mature workers how much we value them and what an important role they play in our health care system.”

Perhaps the most important benefit to attracting older employees, Stone says, is flexibility. LRMC/TVRH offers a range of flexible work options, including five different shifts, from as few as four hours to as many as 12 hours each, plus a wide range of part-time and seasonal schedules. Some employees have summers off. Others who travel north in the summer, work through fall and winter at the center.

“If we don’t have an option that meets our nurses’ needs, we’ll create one,” Stone says. “That’s how important experienced workers are to meeting our needs.”

Such flexibility has paid off for nurses like Becky Tarr, 54, who began her career in 1975. In recent years, Tarr went back to school to get a degree in accounting. She now serves as administrative director of the medical center’s revenue cycle, a position LRMC/TVRH created for her.

“I feel strongly about patient care as well as the fiscal responsibility of health care providers. LRMC/TVRH gives me the opportunity to see that both are realities,” she says. And there’s little doubt about Tarr’s commitment: She commutes 86 miles each way four days a week.



Photos by Myron Leggett

“We’ve never looked back. From the CEO on down, there is a commitment to showing more mature workers how much we value them and what an important role they play in our health care system.”

In addition, the medical center provides a range of support programs for its employees, including child care, nurse refresher courses, critical care and ER internships for nurses who want a new challenge, and a grant program for existing staff members who want to continue their education and commit to working at the center for two years.

Bernie McDonald, 53, is administrative director of peri-operative services. A nurse for 33 years, she's been at LRMV/TVRH for the past 16. Her three-year-old grandson Zachary is enrolled in the hospital's child care center. "It's an extension of the hospital," McDonald says, "and provides quality care that's onsite, which is a huge help to me and my family."

LRMV/TVRH has been named one of AARP's best employers for people over 50 for the past two years, and received a Working Families award from the Orlando Sentinel every year since 2000. In 2005 and 2006, LRMV/TVRH was number one on the list. ■



Above: Norma Urscheler, RN, checks on a patient. Left: Rhodene Elliott works in the radiology department.

at a glance

Location

Leesburg, Florida and
The Villages, Florida

Mission

To serve the health care
needs of the people of
central Florida

Workforce strategy

To recruit and retain
experienced hospital staff
members who will continue a
tradition of high-quality
health care

Number of employees

2,636, 42 percent of whom
are over 50

Impact

After five years of a
recruitment and retention
program aimed at those over
50, the medical center has
reduced staff turnover
dramatically, while cutting
costs and medical errors, and
ensuring quality care

Value of experience

Recruiting and retaining an
older staff helps the medical
center in two ways—it helps
maintain quality of care by
minimizing vacancies and
turnover, and it helps meet the
needs of older patients

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Mature Worker Connection

A program of the Pima Council on Aging

at a glance



Lupe Salas enjoys her encore as an elder rights and benefits outreach advocate at the Pima Council on Aging.

Location

Pima County, Arizona

Mission

To increase employment opportunities for workers aged 50+ and to educate employers about the benefits and advantages of a more mature workforce

Number of employees

3 paid staff, 14 volunteers

Impact

Mature Worker Connection has registered 196 employers (76 are nonprofit/public sector employers) and placed 201 people (67 workers in nonprofit/public sector jobs)

Value of experience

Mature Worker Connection promotes the experience, skills, reliability, commitment to socially meaningful work, and enthusiasm of 50+ employees

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(available Fall 2007)

Some might call the Mature Worker Connection (MWC) an employment agency for adults over 50. Dan Toth, 57, calls it “a lifesaver.” When Toth moved to Arizona after retiring from 33 years with the Colorado state government, he says he never stopped to think that “when you move, you don’t take your infrastructure with you. There I was in Tucson—and I don’t even play golf!—and I was waiting for an employer to call me.”

Instead of sitting by the phone, Toth attended a job fair sponsored by the Mature Worker Connection—and found a full-time second career as the recruitment manager for a local youth literacy program. “It’s incredibly motivating,” he says. “I love heading out to work in the morning.”

Launched in January, 2006, MWC is an innovative, free job placement service for people over 50. In just one year of operation, the nonprofit agency got 196 local employers to list jobs, processed 569 job applicants, and placed 201 of them. One-third of the applicants placed—67 of the 201—found jobs in the nonprofit or public sectors.

“We’re more than just a placement service. We’re an advocate. Our goal is to make our job seekers more marketable,” says Roger Forrester, MWC’s founder and administrator. To that end, MWC staff and volunteers meet individually with all job seekers, assess their skills and interests, provide referrals to training centers when needed, and then work to place them in jobs.

In addition, MWC works to educate employers and, explains Forrester, “explode the myths about older workers. Many employers had the misguided notion that older workers were too expensive or didn’t know the new technology—things like that. Our workers,” he says, “proved them wrong.”

A wide variety of nonprofit employers have listed jobs with MWC, including Pima Community College, the University of Arizona, a clinic for people with AIDS, Habitat for Humanity, elder care

organizations, and many more small nonprofits. To attract more job listings in this sector, MWC is working with groups like the Arizona Alliance of NonProfits.

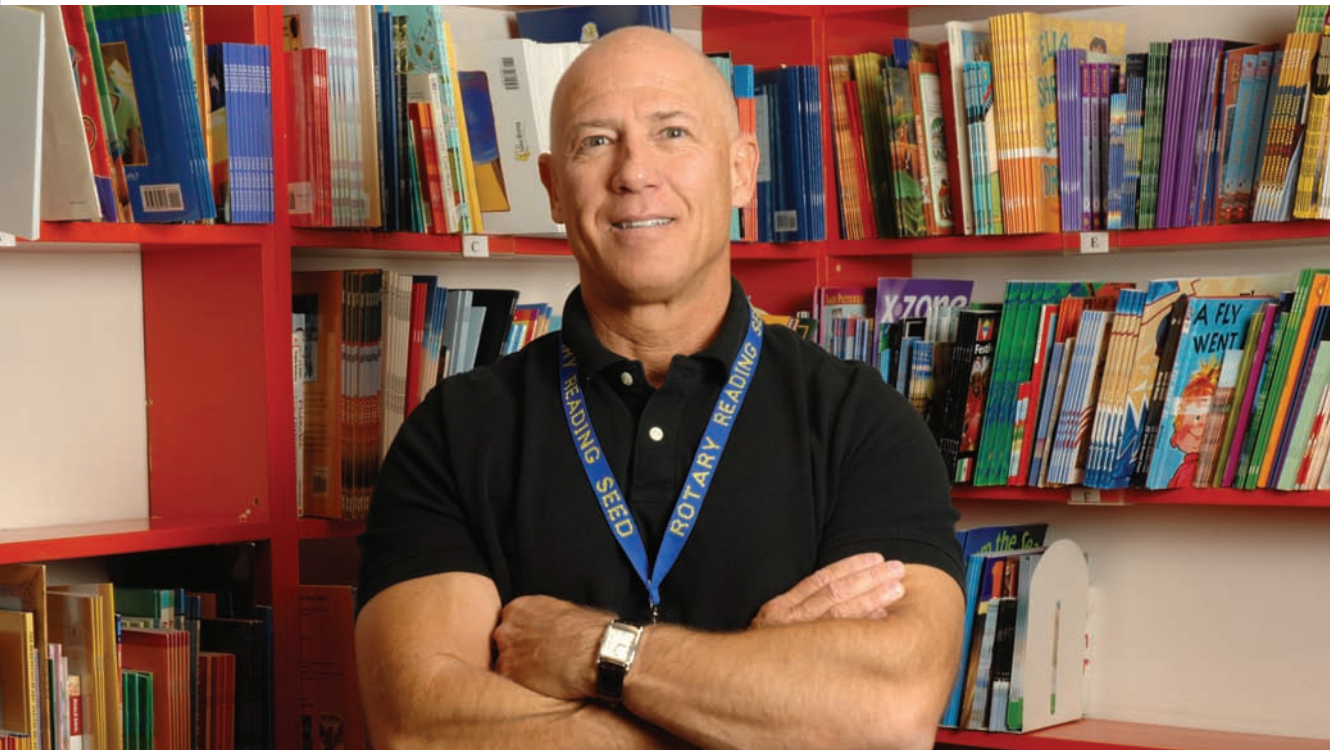
Maude Shingler, business manager for Interfaith Community Services in Pima County, has hired two MWC applicants and would hire more. “There’s much to be said for employees who’ve ‘been there, done that.’ There’s no learning curve and these employees can work with little or no supervision. It’s a win-win situation for us as well as the employees.”

Forrester, 65, is himself in an encore career. After a long stint as a human resources director at the University of Minnesota, Forrester retired and moved to Pima County. He found that many of his new friends and neighbors over 50 were interested in finding jobs but didn’t know how to go about it. In 2003, Forrester began to shop around the idea for an employment agency dedicated to helping them.

“We’re more than just a placement service. We’re an advocate. Our goal is to make our job seekers more marketable.”

With encouragement and support from Jim Murphy, corporate relations director at the Pima Council on Aging, Forrester conducted focus groups with employers; developed a business plan; raised money from local, state, and private foundations; secured in-kind donations from the City of Tucson and Pima County; and recruited volunteers.

In January 2006, MWC opened with a special emphasis on serving women, minorities, and low-income adults. Already, discussions are underway to expand, reach more women and inner-city residents, develop more partnerships with employers and service providers, and create mature worker job clubs. ■



Photos by Chris Mooney, Balfour Walker/Chris Mooney Photography, Inc.

Dan Toth works as a recruitment manager at the Reading Seed Center, a program of the Rotary Club of Tucson.

Nursing Home Ombudsman Agency of the Bluegrass, Inc.



Photos by Neil Suller

Left: Ombudsman Alice Jackson visits with Mary Anne Parris. Right: Marjory Woolery talks with ombudsman Marian Barna.

Marion Barna, 68, a retired executive assistant to the governor of Kentucky, has worked part-time as an ombudsman, helping to meet the needs of nursing home residents in rural Kentucky for four years now. As she knows all too well, an estimated 60 percent of nursing home residents have no personal visitors in a year.

“One resident I worked with had no one except her lawyer and the bank. When she wanted little things like a new pair of slippers or a tube of lipstick, I could bring her those things. I guess you could say that I became her surrogate daughter. When she began declining, I asked the nursing home director to notify me; I didn’t want her to leave this world without having someone there to hold her hand.”

“Residents feel more comfortable with more mature workers, and our staff members bring to their jobs a wealth of life experience and good old common sense, which is essential to effective problem solving.”

The Nursing Home Ombudsman Agency of the Bluegrass, Inc. (NHOA) employs Barna and 32 other ombudsmen—“ombuddies,” as they call them—to help nursing home residents and families of residents address concerns and advocate for improvements in care. Last

year alone, the 33 ombuddies worked with more than 2,000 patients in 60 nursing homes spread across 17 counties in central Kentucky.

Established in 1981, NHOA is one of the first of approximately 500 long-term care ombudsman programs in the nation to make the job a paying one—\$7 an hour—and one of the only ones to fill it almost exclusively with people over 50.

“In fact,” NHOA Executive Director Kathleen Gannoe says, “most other ombudsmen agencies just have a staff of one person who does everything from paper work to visitations. Our set-up makes us a model program for the rest of the nation.”

“Residents feel more comfortable with more mature workers, and our staff members bring to their jobs a wealth of life experience and good old common sense, which is essential to effective problem solving,” explains Gannoe. “Plus, our ombuddies are from the same communities as the residents, so they are known and trusted by friends, neighbors, and families.”

Gannoe says that paying the ombudsmen makes good business sense. “They put in the time—an average of 81 hours a month—and are willing to do the required paperwork, which volunteers are often reluctant to do.” Turnover is low, which boosts quality of care.

NHOA’s ombudsmen range in age from 50 to 80-something and come from careers as diverse as law enforcement, teaching, accounting, and homemaking. They work varying part-time schedules, from 8 to 35 hours per week.

The ombudsmen spend at least 30 minutes per month visiting with and advocating for each nursing home resident. The care they provide is free to residents and families; costs are covered by a variety of public and private sources.

The job, while rewarding, is a tough one. In addition to work with residents and staff, ombudsmen often have to work with estranged families and with attorneys handling guardianship cases.

“Our ombuddies are motivated by a deep commitment to protecting vulnerable elderly residents,” says Gannoe. “They give residents a voice and look out for their best interests, and they provide critical oversight of long-term care conditions in the community. That’s something people don’t think about until they need it.” ■

Ombudsmen range in age from 50 to 80-something and come from careers as diverse as law enforcement, teaching, accounting, and homemaking.

at a glance

Location

Lexington, Kentucky

Mission

To provide advocacy and support for residents in long-term care facilities and to assist families with questions about placement in those environments

Workforce strategy

To employ people over 50 in paid, part-time ombudsmen jobs

Number of employees

33 ombudsmen

Impact

In 2006 NHOA ombudsmen helped more than 2,000 residents of the area’s 60 nursing homes and their families handle concerns and advocate for quality care

Value of experience

The ombudsmen bring common sense, well-honed problem-solving skills, and an ease in relating to nursing home residents

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Older Workers Leading Success

A program of Cleveland Metroparks

Cuyahoga County in Ohio is the second oldest county in the United States outside the Sunbelt. As the greater Cleveland area ages, where will all the people over 50 find work?

That's one of many questions about an aging population that forward-thinking leaders of the Cleveland Foundation asked themselves in 2002 when they launched a \$4 million, three-year Successful Aging Initiative.

“The diversity in my office is wonderful. We’re all ages and backgrounds and we learn from each other.”

“We found a series of barriers alienating workers aged 50 and above from the workplace in Northeast Ohio,” says Stacey Easterling, director of Community Responsive Grantmaking at The Cleveland Foundation, “from a lack of recruitment and retention efforts for older workers to a lack of flexible work schedules.”

To help address the problem, the Foundation gave six start-up grants to area employers in 2004, including one to Cleveland

Metroparks—which operates Cleveland Metroparks Zoo and the “Emerald Necklace” Park District—including hiking trails, winter sports, a zoo, and golf courses.

Diane McDaniel, human resource director at Cleveland Metroparks, says she knew immediately that the pilot, known as Older Workers Leading Success or OWLS, would be a good fit. “The park district has an ongoing need for seasonal and part-time employees,” she explains. “The grant allowed us to increase our talent pool by adding older workers in positions ranging from trail monitors to IT assistants.”

Mike McCormick, 69, a retired pressman with the Cleveland Plain Dealer and long-standing volunteer with the Park District, was eager to apply for a paying job doing what he loved. Today McCormick is beginning his third year as a paid trail monitor coordinator—making sure that hike and bike trails are covered by trail monitors. He works anywhere from two to four hours a day during the May-November park season and several hours during the off months “writing reports, attending meetings, etc.”

“The best part of my job,” he says “is meeting and working with the great volunteers. I have never walked away without someone saying ‘thank you.’”

When 61-year-old Barbara Sherman retired from her career as an executive assistant with a leading Cleveland bank, she knew that she still wanted to work. For two years now, Sherman has been a secretary in the Metroparks office, where she works two half-days a week in the off-season, and four half-days weekly from May to November.

“The diversity in my office is wonderful,” she says. “We’re all ages and backgrounds and we learn from each other.” And it doesn’t hurt that the office is so close to Sherman’s home. “No more long commutes and driving on the freeway for me.”



Photos by Casey Batule

Tina Bates reviews a document with Barbara Sherman (seated). Over the past two years, OWLS has added more than 150 seasonal employees over 50 to the Cleveland Metroparks payroll.

Over the past two years, the OWLS program has added more than 150 seasonal employees over 50 to the Cleveland Metroparks payroll and eight people over age 50 in year-round, part-time jobs. In addition to salary, the agency arranged with its health insurer to offer the part-time employees the option of buying into its HMO plan at the group rate. Funding for OWLS now comes from a combination of tax revenues and fees for services.

“It’s been a real win-win for both the park and the employees,” says McDaniel. “This age group is reliable and knowledgeable, and these employees have a good impact on other employees—especially younger ones. They are definitely committed to the Park District.” ■

at a glance

Location

Cleveland, Ohio

Mission

To conserve significant natural resources and enhance people’s lives by providing safe, high-quality outdoor education, recreation, and zoological opportunities

Workforce strategy

To recruit and place people over 50 in seasonal and part-time jobs within Cleveland Metroparks, the government agency that operates Cleveland Metroparks Zoo and the Park District

Number of employees

Approximately 1,200 total; about 480, or 39 percent, are over age 50

Impact

Over the past two years, the OWLS program has added more than 150 employees over 50 years old to the Cleveland Metroparks payroll. This group is doing essential agency work inside the agency’s offices and outside at Cleveland Metroparks Zoo, Park District reservations and golf courses

Value of experience

Employees over 50 meet year-round and seasonal agency needs, are reliable, knowledgeable, and provide role models for younger employees

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Michael McCormick monitors one of the Park District bike trails. He is beginning his third year as a paid trail monitor coordinator after a career as a pressman.

Rainbow Intergenerational Child Care Program

A program of the Little Havana Activities and Nutrition Centers of Dade County

The idea for the Rainbow Intergenerational Child Care surfaced back in the late 1980s, when workers at the Little Havana Activities and Nutrition Centers, a social service provider running dozens of programs for low-income elderly in Miami, noticed more and more people bringing their grandchildren along for social time at the organization's senior center.

The President at the time, Josefina Carbonell, saw the invaluable assets of this population—their experiences, skills, knowledge, and cultural wealth. "This was an asset we could not see wasted. Their grandchildren were our first students, but after awhile, our classes grew to include a broader group of kids from the community."

Today, one Rainbow childcare center is located on the grounds of senior centers in Little Havana, a predominantly Hispanic area of Miami. The 30 women who work there are all over 50; nearly all work 20 hours each week, four hours per day. Six work full-time, including Cecilia Hunt, the current director. Together, they serve 104 children, ages two to five.



Photos © by Alex Harris

Children play and learn in the Rainbow Intergenerational Child Care Program. The success of the program stems in part from its intergenerational nature.

at a glance

Location

Miami, Florida

Mission

To provide dependable, affordable, educational daycare for children and improve the quality of life for economically disadvantaged older adults in South Florida

Workforce strategy

To engage older adults in the community as state-certified childcare workers

Number of employees

30, all over 50 years old

Impact

Two Rainbow centers serve 109 children; 200 are on a waiting list

Value of experience

Older childcare workers from the community provide reliable, consistent, culturally-enriching care for the preschool children of working parents and grandparents

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The success of the program stems from its intergenerational nature and ability to meet the needs of three populations at once—children, who get quality early childhood education, working parents, who get peace of mind, and older adults who get jobs they love and income support they need.

“Our teachers are unique,” says Hunt. “They are state-certified as childcare workers and are paid just \$7-\$9 per hour, yet they rarely leave. Is there another childcare center that can say they have over 10 staff members with 18, 15 and 10 years working with preschoolers? For years we had zero turnover,” says Hunt. “The staff stability that comes with an older workforce is an invaluable asset in a childcare program.”

Plus, Hunt adds, “Older people bring with them the calm and patience you’d expect, but also a boundless, steadying emotional warmth. Some teachers look at kids as ‘the subject of my interest.’ Our teachers see these children as ‘the subject of my heart.’”

Divina Ramirez, 62, who has been at Rainbow since 1992, agrees. A former elementary teacher in her native Cuba, and one of the program’s lead teachers, Ramirez stays because, “I love the children. I give back to them because of the energy I get from them. They make me happy. I like helping them grow.”

Like Ramirez, all of the center’s teachers (as well as many of the center’s children) are immigrants—some are Cuban refugees—who take great pleasure and pride in preparing their young children born in America for a successful school life, while teaching them the traditions and culture of their native lands through language, songs, foods, and celebrations.

Hunt says there’s more going on than meets the eye. “Children have the opportunity to feel proud of their culture, of what they are, and of their customs and traditions, while adjusting to a new environment, an essential element for healthy development.”

The mostly young and low-income working parents of children at the Rainbow centers say they like knowing that their children have a safe, loving environment to go to during the day. “It relieves the stress I feel about leaving for work when I know they are going to be well taken care of,” one parent says. “It makes me feel good to know that they are happy at Rainbow.” ■

“The staff stability that comes with an older workforce is an invaluable asset in a childcare program.”

ReServe Elder Service, Inc.

Richard Cherry, executive director of the Community Environmental Center, a nonprofit helping low-income residents in New York save energy, is spending time these days boasting about his new hires. “When I tell colleagues about the caliber of these employees, their eyes light up!”

Cherry’s referring to three new employees he hired recently with the help of ReServe, Inc., a two-year-old nonprofit that bridges the gap between the old world of senior volunteering and the new world of encore careers by connecting those over 55 with part-time, stipended jobs solely in the nonprofit and public sectors.

“There’s just no substitute for their experience, skills, and knowledge.”

“We’ve hired a retired electrical engineer who has learned new ways of engineering in record time,” Cherry says. “We also brought on a long-time publicist who had been forced to retire. His wealth of experience is being put to great use in our written materials.”

The last of Cherry’s new hires is Pauline Augustine, a retired national and international marketing consultant, who is working for a subsidiary of the Community Environmental Center called Solar One. Given her long-time interest in alternative energy, Augustine sees Solar One, a green-energy arts and education center, as the perfect place to land.

“It’s great to be able to use my skills and talents in a place that’s doing work I believe in,” Augustine says, “and one that treats me like a pro. I’m doing useful work that’s valued.”

Speaking of all three employees, Cherry says, “There’s just no substitute for their experience, skills, and knowledge.”

In less than two years, ReServe has become a recognized source of skilled employees over 55 for dozens of New York City nonprofits and city agencies.

Today there are 360 ReServists, 215 of whom have been placed in about 60 host organizations in tasks ranging from senior management to the reception desk. They work on

at a glance



Photo by James Estrin

ReServist Len Fischman works with the public as a city guide for the Alliance for Downtown New York.

Location

New York City

Mission

To match people over 55 with stipend-paying, part-time jobs in the nonprofit and public sectors in the New York City area

Number of employees

10, four of whom are ReServists

Impact

About 200 older adults have been placed at approximately 60 organizations

Value of experience

Applicants are placed in jobs that specifically use their skills and experience. For example, a legal secretary now writes court summaries for judges, a banker works with a nonprofit to improve client fund investment strategies, and a lawyer works in the public advocate’s office.

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Photo by Mori Sheinman

ReServist Trudy Solin (center) works as an art instructor at Lincoln Square Neighborhood Center. In less than two years, ReServe has become a recognized source of skilled employees over 55 for dozens of New York City nonprofits and city agencies.

average 15 hours a week, approximately 46 weeks of the year. Negotiations are in progress with another 30 nonprofit/public sector agencies for placement of 200 ReServists who range in age from 55 to 75.

All ReServists are paid a \$10-per-hour stipend and placed in jobs as attorneys, social workers, teachers, artists, communications specialists, youth workers, bankers, and health professionals. The work is just as varied and includes teaching art, marketing, fundraising, and health advocacy for isolated elders.

ReServe has been funded to date exclusively by foundation, corporation and individual grants and donations. The money raised covers the costs of running the program and is intended to cover the cost of stipends for those placed in jobs. But that hasn't always been necessary.

"We budgeted \$82,000 for stipends in the first year, but we paid only \$7,500. The host organizations have been so pleased that most have paid for the stipends themselves," explains ReServe Executive Director Claire Haaga Altman. "Employers recognize that ReServists enable them to expand and augment their services at remarkably reasonable costs."

In 2005, starting ReServe meant a big effort to recruit employers and convince them that they could benefit from part-time experienced workers. But success is showing. "Today," Altman says, "we have nonprofits calling us for employees." ■

"Employers recognize that ReServists enable them to expand and augment their services at remarkably reasonable costs."

Retiree Work Opportunities Program

A program of The University of California,
Berkeley Retirement Center

There's a "UC Berkeley way of doing things," and 65-year-old Irma Smith has been doing things that way for 29 years. Thanks to a new website on campus, she doesn't plan to stop anytime soon.

Not long after Smith retired in 2001 as a finance officer in the UC Office of the President, she learned about a website the university was pilot-testing for retired staff at the University of California, Berkeley. The concept was to create an online resource to publicize part-time temporary and short-term, project-based assignments and house profiles of retired staff members who want to be considered for those work opportunities.

“When baby boomers retire, they leave behind them a huge gap of institutional knowledge and expertise that can't be easily replaced by incoming recruits.”

Smith was eager to sign up—and has since had five successful placements, each lasting about three months. “Since I've been around so long—and know ‘the Berkeley way’—I've been able to walk right in and start working,” she says. “It's been great.”

Shelley Glazer, executive director of the University of California, Berkeley Retirement Center, says that the website—an immediate success when it was launched in 2002—fills a growing need for both the university and its retirees.

“When baby boomers retire, they leave behind them a huge gap of institutional knowledge and expertise that can't be easily replaced by incoming recruits,” Glazer says. “Returning retirees can hit the ground running.”

Currently over 330 UC Berkeley retirees and more than 240 hiring managers have registered and are using the Retiree Work Opportunities website to find each other. About 80 percent of the opportunities listed on the website are filled by UC retirees.

Here's how the website works: Retired staff members post online web profiles and/or resumes highlighting their skills and interests, UC work history, and preferences for scheduling



Photos by S. Smith Patrick



Ralph Moon (left) consults with his department supervisor, Jon Conhaim, in the technology program office. Above right: Irma Smith is back on assignment at UC Berkeley after serving as finance officer.



Left: Camden Rutter has discovered new opportunities through the program. Middle: Student Razika Hussein reviews work with Linda Dayce, who provides administrative support after 18 years of employment at UC Berkeley. Right: Ronald Outlaw and Emily Karakashian work together in the Employment Services Department.

and placement. They can edit their profiles and update their availability, for instance, whenever they want. Hiring managers post opportunities on the website, stating skills needed, project duration, and schedule.

Then the two-way conversation begins. Managers seeking to fill a job can contact retirees directly, or retirees can initiate contact with managers if they see a listing of interest to them. Once hired, the retiree is paid by the department that posted the job.

Deborah Wolfe, manager of accounting and purchasing in the Department of Molecular and Cell Biology, has nothing but praise for the administrative staffer she found through the website. “Not only is she utterly reliable and dependable, she’s not looking to change jobs.” Plus, she’s adaptable. “She learned the upgraded university financial system quickly and in an unflinching conscientious and pleasant manner,” Wolfe says.

The website now lists only non-academic jobs, but the Center is looking into adding part-time, temporary projects for academics. ■

at a glance

Location

Berkeley, California

Mission

The UC Berkeley Retirement Center is dedicated to developing programs and services that contribute to the well-being and creativity of retired faculty, staff and their families and that support the UC community

Workforce strategy

To match UC Berkeley retirees with department heads looking to fill part-time and temporary vacancies on campus

Number of employees

(at the Retirement Center)
3.5 full time, 3 part-time retirees, and 4 to 6 work-study students

Impact

Over 330 UC Berkeley retirees, UC Office of the President (UCOP) and Lawrence Berkeley

National Laboratory (LBNL) retirees and more than 240 hiring managers have registered and are using the Retiree Work Opportunities website to meet their temporary employment needs

Value of experience

Managers are often eager for the institutional knowledge and proven skills that retirees bring to temporary, part-time assignments

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Troops to Teachers

After a 30-year Navy career, 57-year-old John Paulson has begun his second tour of duty—teaching physics at a suburban Washington, D.C., high school. Not only is his encore career personally satisfying, but it's helping to meet the critical need for K-12 teachers in the nation's public schools.

Paulson is one of about 10,000 military veterans who have become public school teachers and administrators through a federal program called Troops to Teachers. Started in 1993, the program helps retiring military personnel with at least ten years of service begin new careers as teachers.

Troops to Teachers provides a range of help to retiring military personnel, including career counseling, information about state certification requirements, financial assistance to help cover the costs of classes and tests required for teaching certificates, and placement in schools serving low-income students.

Troops to Teachers graduates offer mentoring to others going through the program. And, in a new benefit, graduates can now line up a job in certain school systems two or three years before they leave military service, making life planning a lot easier.

After a 22-year career as an Air Force senior master sergeant, Troops to Teachers helped Sandra Sessoms-Penny, 51, earn a master's degree and become a social studies teacher. Now she's serving as assistant principal of a 500-student high school in rural Virginia. But Sessoms-Penny isn't stopping there: She's working on a Ph.D. from George Washington University, where her dissertation focuses on the role of Troops to Teachers in meeting the nation's need for teachers, now estimated at 200,000 each year.



Photos © by Alex Harris

Sandra Sessoms-Penny enjoys an encore career as an assistant principal. Troops to Teachers helped her go back to school to work in education after a career in the Air Force.

at a glance

Location

This federal program operates nationally, funded by the Department of Education under the No Child Left Behind Act. Troops to Teachers operates under a partnership between the Department of Education and the Department of Defense, managed and operated by the Defense Activity for Non Traditional Education Support Activity (DANTES).

Mission

To provide retired service men and women opportunities for second careers as public school teachers.

Number of employees

57 at the state level, 2 federal and 13 contractors

Impact

Approximately 10,000 retired military personnel are now in second careers as public school teachers

Value of experience

Those who have served in the military bring discipline, commitment, and leadership skills to teaching. Troops to Teachers recruits are more likely to fill shortages in math and science, be minority and male, and to stay in the profession longer than other new teachers. They get high ratings from principals, too.

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Sessoms-Penny believes that older and more experienced teachers—like those from the Troops to Teachers program—know what they’re getting into. “In school systems, like in the military, you are standing in defense of folks who don’t know you or respect you or what you’re doing. Not everybody supports what you do or how you do it, but you know that it must be done.”

And, Sessoms-Penny adds, Troops teachers can get the job done. “Military folks are used to being part of something and making it work. We know that discipline, teamwork, planning, and organizing are essential to getting things done in a timely manner. The same ingredients apply to school systems.”

Recent research on the Troops to Teachers program demonstrates overwhelming success. Ninety percent of principals surveyed in 2005 said that they considered former service members more effective in classroom instruction and management than other teachers with similar years of teaching experience. The principals added that Troops teachers boost student achievement more than traditionally trained teachers.

And Troops to Teachers provides other bonuses. It helps to balance the overall pool of new teachers, now nearly three-quarters women and overwhelmingly white. Four out of five Troops teachers are men, and more than 25 percent are African Americans. Large percentages of Troops teachers are trained to teach math, science, and special education—subject areas facing severe teacher shortages. And Troops to Teachers graduates are more likely to stay in teaching longer than other new teachers, making the program a cost-effective way to recruit and retain quality teachers.

Troops to Teachers has had a see-saw history with regard to federal funding, but has spawned other small federal programs, including Spouses to Teachers and Troops to Nurse Teachers. All are based on the philosophy stated clearly in the program’s motto: “Proud to Serve Again.” ■

Started in 1993, the program helps retiring military personnel with at least ten years of service begin new careers as teachers.



The YMCA of Greater Rochester

It may seem like a long way from steel mills to treadmills, but both have played a major role in John “Jack” Snyder’s life. Snyder worked for 23 years in the steel mills, all the while nursing a passion for physical training. Today Snyder, 70, is instilling that passion in others—“all ages, shapes, and sizes”—as a coach at the YMCA of Greater Rochester, one of the largest Ys in the nation.

Snyder is one of hundreds of employees over 50 recruited when a wellness campaign designed to interest older adults hit pay dirt. The program called “Silver Sneakers” has brought in 10,000 new members since it began in 2004.

As a result, “we realized that retaining and recruiting older employees should be a top priority,” explains Fernan Cepero, the YMCA’s vice president of human resources. “We wanted employees who matched this growing demographic.”

So the Y began to change its personnel policies to attract older employees, offering alternative work arrangements, including job sharing, part-time positions (as little as four hours per week), and flexible work schedules. It began to recruit with the help of Lifespan, a Rochester nonprofit that provides training and job placement programs for people over 55, the local Veterans Affairs office, and Rochester Works.

The Y provided free training and free membership for all its employees. And it added a program called Mentoring Across Generations to foster inclusiveness and teambuilding between the younger and the older employees. In the past few years, 75 pairs have met regularly for career advice and friendship.

This workforce strategy has paid off. Since the effort began, the percentage of employees over 50 has increased by a third, now numbering about 400. That’s “good for the Y,” says Cepero, and good for older members who “feel more comfortable with more mature workers.” The older employees are more reliable, more likely to complete assignments, and more skilled at speaking and writing than younger employees, Cepero says, adding that the turnover rate for those 50 and older is just 2 percent, compared to 20 percent overall.

Elladean Dunn, 70, has been a training fitness specialist for 30 years and now works three days a week. “My current schedule fits my lifestyle perfectly and it serves a purpose for the Y as well.” Dunn’s fitness classes are made up of adults aged 50 to 92.

Other Y employees have made similar accommodations. Deanne Wooden, 65, went from managing a program full-time to raising money for it three days a week. And Ethel Adell, 56, transitioned from running a girls summer camp to becoming a certified Early Head Start teacher.

Employees like these bring experience and perspective to the job. “Their life experiences make them better communicators and better at defusing confrontation,” Doug Long, the Y’s health and fitness director, recently told a reporter from *The Chronicle of Philanthropy*. “They’re more effective at dealing with 14- to 16-year-olds.”



Top: Ethel Adell ran a girls summer camp before becoming a certified Early Head Start teacher. She now works with young children at the Y. Bottom: Pete Reiniger began an encore career as a lifeguard at the Y.

“Their life experiences make them better communicators and better at defusing confrontation.”

The Rochester Y's campaign to employ older adults has been noticed by the *Chronicle*, a source of national news about the nonprofit community, and by AARP, which has named the Y one of the nation's best employers for workers over 50 two years in a row. ■



Photos by Ken Hulth

Trainer Bill Hearne consults with YMCA member Lillian Gentry.

at a glance

Location

Rochester, New York

Mission

To place Christian principles into practice through community programs that build a healthy spirit, mind, and body for all

Workforce strategy

To recruit and retain employees over 50 years of age in one of the largest YMCAs in North America

Number of employees

2,100, about 20 percent of whom are 50+

Impact

The percentage of employees 50+ has increased from 15 percent to 20 percent since the program began in 2004

Value of experience

Older employees match the needs of an increasing number of Y members who are themselves over 50, serve as mentors and role models for younger staff, bring strong skills and stability, and reduce staff turnover

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The Business Case for Hiring Boomers

Phyllis N. Segal

All signposts point to baby boomers working long past the age when their parents were expected to retire—creating both a challenge and opportunity for America’s employers. But what work will they do?

Some industries are already recognizing this growing pool of experienced workers as a resource. Companies like Home Depot, Borders and others in the for-profit sector, are conducting high profile recruitment campaigns targeted to attract older adults with part-time, seasonal and other flexible job opportunities.

But, as reported in the 2005 *MetLife Foundation/Civic Ventures New Face of Work Survey*, fully half of those aged 50 to 70 want to do work now or in the future that improves the quality of life in their communities. This is, after all, the generation that came of age hearing President Kennedy’s call to “ask not what your country can do for you, ask what you can do for your country.” Over 40 years later, when asked “what kind of work do you want to do?” two of their top three responses are education and social services.

That should be good news, since nurses, childcare workers, teachers, nursing home staff and nonprofit executives are already in short supply. The nonprofit sector is adding paid jobs at a much higher rate than employers as a whole, and current and projected labor force needs threaten the capacity of nonprofit organizations and the public sector to carry out their social purpose missions.

Despite the unmet labor needs all around them, few questioned for *The New Face of Work Survey* thought it would be easy to find jobs where they could make a difference. And, unfortunately, they are right. The difficulties facing boomers seeking such work are described in recent reports by The Conference Board and the Partnership for Public Service. There are few easily accessible pathways for employers to recruit older adults or for boomers to find social purpose jobs. Internal organizational obstacles include employer misconceptions about older adults, inadequate investment in human resource management, hiring practices that get in the way, and a dearth of flexible work opportunities.

There are few easily accessible pathways for employers to recruit older adults or for boomers to find social purpose jobs.

And yet, there are some organizations in the nonprofit and public sectors—not nearly a wave, but more than a trickle—that are breaking through these barriers and finding creative and successful ways to tap the boomer talent pool to meet their staffing needs.

The diversity of these organizations signals their broad potential as role models for the entire social purpose sector. They range from small nonprofits in rural Kentucky and central Pennsylvania, to a large public university and one of the largest YMCAs in North America. Some operate with as few as 20 employees, others with over 2,000. Their employees are engaged in a wide range of important social purpose jobs in direct service and organizational roles—as child care workers, teachers, drivers, advocates, program managers, fundraisers, administrators, marketing executives, and more.

Differences aside, the nonprofit and public sector organizations honored as BreakThrough Award winners in this report share one critical learning: Recruiting and retaining employees over 50 has been a successful strategy. To be perfectly clear, when it comes to educating children, taking care of the sick, providing services to those in need, and effectively managing social purpose organizations, there's a strong business case for hiring boomers.

There are many other lessons to be gleaned from the experiences of organizations that are engaging a 50+ workforce. Here's what we know so far from the 10 BreakThrough Award winners:

The reasons

BreakThrough Award winners look for employees over 50 to meet the pressing workforce needs that older employees are primed to meet.

► **Employees over 50 can fill gaps caused by program growth and shortages in critical fields.**

Plans to open a new hospital with big staffing needs, and the challenge of industry-wide nursing shortages, led **Leesburg Regional Medical Center and The Villages Regional Hospital (LRMC/TVRH)** to target recruiting and retaining 50+ workers. Today 42 percent of its workforce is over 50 and its staff vacancy rate is just five percent.

Troops to Teachers, a national program, addresses critical teacher shortages by helping military veterans begin new careers as public school teachers, especially in math, science and special education where shortages are most severe.

► **Employees over 50 can serve the needs of an increasing number of older clients.**

The **Nursing Home Ombudsman Agency of the Bluegrass, Inc.**, looks to adults over 50 for its ombuddies because they have life-tested problem-solving skills and are able to relate particularly well to the frail elders the nonprofit serves.

The **Rochester YMCA** has discovered that its growing older adult membership appreciates fitness instructors who know from experience the aches and pains of aging and the limits of older bodies.

► **Employees over 50 can fill gaps in expertise and institutional knowledge and meet temporary staffing needs.**

To cushion the brain drain from voluntary early retirements, **The University of California Berkeley's Retirement Center** created **The Retiree Work Opportunities (RWO) Program**, a website that connects retirees who want to continue working and campus departments that need work done. Now hiring managers can find people with the institutional knowledge and know-how to fill short-term and part-time assignments in such fields as grantwriting, budget work, strategic planning and information technology. And they can hire people to cover gaps when employees are on parental and medical leave.

The gains

BreakThrough Award winners find that employing people over 50 produces consistent high-quality service for clients and cost savings for employers.

► **Employees over 50 bring a commitment and reliability to social purpose jobs that reduces costly staff turnover.**

At the **Rainbow Intergenerational Child Care Center**, a project of the Little Havana Activities and Nutrition Centers of Dade County, absenteeism is rare and turnover is nonexistent, in an industry where turnover is typically high.

At the **Nursing Home Ombudsman Agency**, frail elders are well served by the stable 50+ workforce. Years go by without turnover, and years with “high turnover” mean replacing just two or three employees.

At **LRMC/TVRH**, the drive to attract and retain older workers has produced RN turnover rates of less than 9%, compared with an industry average that’s much higher.

And the veterans who have become teachers through **Troops to Teachers** are more likely to stay in teaching longer than other new teachers.

► **The life and work skills of 50+ employees reduce the cost of employee training and minimize mistakes and failure on the job.**

For **Allied Coordinated Transportation Services**, a small Pennsylvania nonprofit, hiring former truck drivers (nearly all over 50) has meant an experienced workforce that safely transports children whose moms are in welfare-to-work programs, and kidney dialysis patients going to medical appointments.

The Interfaith Community Services in Pima County, Arizona, which has hired two staffers through the **Mature Worker Connection**, is pleased that there is “no learning curve” and its new workers need “little or no supervision.”

Military veterans helped by **Troops to Teachers** bring to their new careers as teachers the “leadership, discipline, teamwork, planning, and organizing” experience that is essential to success in the military and teaching alike.

► **The ability of older employees to mentor younger ones strengthens the entire workforce.**

The **Rochester YMCA** has created a formal Mentoring Across Generations program that pairs baby boomers and younger staff—giving mentors an opportunity to share “their knowledge, insights and perspective” and young employees “invaluable life-learning experiences.”

Mentoring is informal but equally important at the **University of California Berkeley**, where the retirees brought back by the **RWO Program** help develop the young professionals and students who work alongside them.

The incentives

To attract boomers, BreakThrough Award winners use tried-and-true recruitment and retention strategies—in creative ways.

► **It helps to focus recruitment efforts on well-qualified experienced people.**

ReServe, a boomer social purpose recruitment agency, uses a variety of paths to recruit job applicants, including alumni group listserves, targeted mailings to retired professional association members and advertising in community papers.

LRMC/TVRH recruits by increasing its visibility where retirees live and shop, at job fairs, and with materials that feature pictures of older employees.

At the **University of California Berkeley**, the RWO recruitment website allows hiring managers to quickly reach experienced retirees familiar with the University, interested in flexible short-term assignments, and with the skills to do the job.

► **Boomers want options. So to attract them, create as many different flexible work options as possible.**

Cleveland Metroparks always had a large seasonal workforce, though until it began its **OWLS** program, these were seen primarily as jobs for students. Through this new program, the agency has attracted 50+ adults to these and also to part-time positions, and its seasonal workforce is now more intergenerational.

At **LRMC/TVRH**, flexibility has become the norm: scheduling options include shifts ranging from 4 to 12 hours, compressed schedules such as weekend-only work, seasonal jobs (with summers or up to six months off each year), job sharing and telecommuting.

► **There are ways to entice boomers by getting creative with compensation.**

Childcare for grandkids and long-term care insurance are among the benefits offered staff at **LRMC/TVRH**, which also gives employees who are already covered by a spouse's insurance the option of a higher salary with no benefits.

Cleveland Metroparks found a way to help its part-time workers with their health insurance needs, without extending insurance as an employer-paid benefit: This agency arranged with its health insurer to offer workers the option of buying into its HMO plan at the group rate. In addition, part-time employees can access the agency's benefits consultants for advice on other individual plan options.

The intermediary nonprofit **ReServe** established a standard \$10 per hour stipend for any and all jobs ReServists fill. That flat rate is enough to engage many experienced, top professionals, from attorneys to fundraisers.

The connectors

BreakThrough Award winners that connect boomers to social purpose jobs fill critical human resource needs for the nonprofit and public sectors.

► **Connectors help older adults transition to new social purpose careers.**

Troops to Teachers connects eligible service men and women with public schools needing teachers, helping military personnel move into encore careers, and bringing diversity to the overall pool of new teachers.

► **Connectors save employers money and time by allowing them to outsource key human resources functions.**

Two connector organizations at opposite ends of the country, **Mature Workers Connection** and **ReServe**, help social purpose employers find well-qualified employees over 50 by handling the recruitment and screening—of jobs as well as people. Although these two connector programs operate with very different models, both work closely with the job seeker and employer to assure a good fit between the two. They help shape the employers' needs into jobs that will attract 50+ applicants, refer top candidates, and assist with workforce development. They keep close contact with the employer and worker to assure ongoing success. Providing HR functions like this is particularly important for small nonprofits that do not have their own professional human resource units.

The funders

BreakThrough Award winners show how seed money from foundations and others bears fruit and, in the long run, helps our nation realize an experience dividend.

► **Pilot programs give employers a chance to see the value of investing in older employees.**

A start-up grant from the Cleveland Foundation inspired and made it possible for **Cleveland Metroparks** to pilot the first year of its **OWLS** program. In the process, this employer discovered the good match between its needs and the talent pool of 50+ workers—so much so that the agency is now using its own budget to continue the targeted recruitment of 50+ workers for flexible seasonal and part-time jobs.

► **Pilot programs give organizations that connect boomers to encore careers a chance to prove their effectiveness.**

Start-up funding from foundations, the state of Arizona, and local government made it possible for **Mature Workers Connection** to demonstrate its effectiveness. Now in its second year, this nonprofit has increased its budget by over 25% and garnered its first multi-year funding.

The foundations and other donors funding **ReServe** have seen their support go farther than expected. The grants were intended to cover the stipends paid to ReServists for their work, as well as program administration costs. Because the organizations employing ReServists have chosen to pay 100 percent of the stipends from their own budgets, they have effectively become another source of support leveraged by the funders' investments in ReServe.

► **Pilot programs create change that will last for the long term.**

When **ReServe** was launched, one of the biggest challenges was convincing employers that they could benefit from part-time experienced workers. Two years later, employers are calling ReServe looking for candidates. For employers hiring workers through ReServe, and for other BreakThrough Award winners, experience with this workforce is dramatically shifting perceptions of the value these employees add to the organization.



There will be more to learn from these BreakThrough Award winners as they continue to tap boomer talent, and experiment with new approaches. **ReServe**, for instance, is piloting a new paymaster role, to ease payroll processing burdens for host employers and expedite payment to ReServists. And there will be much to learn from other organizations that are adopting a boomer workforce strategy—like **Generations Incorporated**, a small Boston-based nonprofit that is now recruiting experienced professionals who know how to manage groups of people to achieve results. And from other connector programs—like the community colleges that are encouraged by MetLife Foundation/Civic Ventures grants to prepare boomers for social purpose careers.

As social purpose employers expand opportunities for engaging this experienced workforce, they will lead the way for others. And their experience will pose questions that need to be answered: Could policy changes spur more rapid progress? Do the organizational challenges, and solutions, vary for different size workforces? Can social purpose employers work together to expand effective recruitment and develop creative benefits to attract experienced adults? What roles can be played by existing institutions, like higher education, and what new programs are needed to capture boomer talent for social purpose workforce needs?

Civic Ventures and its partners will continue to study—and shine a light on—the growing number of organizations making it easier for baby boomers to find purpose-driven jobs. The goal, of course, is not just to create happy employees and successful employers. It is to meet pressing social and fiscal needs by bringing both purpose and income to longer lives—in short, to create an experience dividend for America. ■

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MetLife Foundation

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Civic Ventures is a think tank and incubator, generating ideas and inventing programs to help society achieve the greatest return on experience. Learn more at www.civicventures.org.

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