



Tapping Encore Talent

A MetLife Foundation/Civic Ventures
Survey of Nonprofit Employers



MetLife Foundation



“Great vision without
great people is irrelevant.”

Jim Collins

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Survey conducted by Peter D. Hart Research Associates, Inc. from February to April 2008, involving phone interviews with a national sample of 427 nonprofit employers.

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What if talent were no object?

Foreword by Marc Freedman

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



Most nonprofit leaders I know do a lot of good in the world with little money. But most, and I include myself here, have a longstanding fantasy of unlimited organizational budgets. What if money were no object? How much could we do to change the world?

Today there is a growing realization that when it comes to impact in the social sector, talent is as important as money—human resources are as significant as financial ones. New research, in this and in earlier reports, raises the prospect of a vast new market for human resources—and a new fantasy for nonprofit leaders: What if talent were no object? How much could we accomplish then?

It could happen. If only a modest percentage of the boomers who say pursuing an encore career is a top priority, and a fraction of the organizations that show an interest in hiring this group were to act on that impulse, the result would be a genuine windfall of time, skills, and experience in areas deeply dependent on these attributes to succeed. This windfall could alleviate current human resource gaps and might even lead to entirely new solutions—to poverty, hunger, homelessness, the uninsured, and the dropout rate—that might not have been evident or possible without the people to do those things that only people can do.

This report and its companion volume (*MetLife Foundation/Civic Ventures Encore Career Survey*) offer many reminders that this windfall of talent is far from being realized. A set of impediments remain—in individual attitudes, employer practices, inadequate pathways, outdated policies, and the fear of unintended consequences.

But there is so much enlightened interest aligning around the encore career idea—from individuals looking for meaning, organizations short on talent, and from a society that needs boomers to work longer and faces a growing set of social problems—that the impetus to overcome these barriers and realize the promise of encore careers is likely to grow.

Nearly 10,000 boomers turn 60 every day. That's a lot of talent. How much more impetus do we need? ■

Getting the right people on the bus

Essay by Phyllis N. Segal

Phyllis N. Segal, an attorney and educator, is in her encore career as a vice president of Civic Ventures and director of this research project.

Are boomers all dressed up with no place to go?

The *MetLife Foundation/Civic Ventures Encore Career Survey*, published earlier this year, found that as many as 8.4 million people between 44 and 70 are already in encore careers—jobs that combine greater meaning, social impact and continued income. They've clearly got someplace to go.

But the survey also found that tens of millions of others—in fact, half of all boomers not already in encore careers—would like to move into jobs that matter, jobs that improve the quality of life in our nation's communities. Will these boomers be able to find their encore careers?

The nonprofit sector seems the most likely place. According to the Urban Institute's *Nonprofit Almanac 2008*, there are approximately 1.4 million nonprofit organizations registered with the IRS. Within that number, you'll find an incredibly diverse group of employers—from hospitals to homeless shelters, foundations to food banks, advocacy groups to universities to chambers of commerce. A large majority of these are public charities, which in 2005 reported spending over a trillion dollars. By any measure, the nonprofit sector is a significant part of the U.S. economy, accounting for 5.2 percent of the nation's gross domestic product, over 8 percent of its wages and 10 percent of employment in our country.

The nonprofit sector is growing—faster than business or government—and the need for new nonprofit staff is growing, too. But will nonprofits look to tap the growing supply of willing encore workers to meet their workforce needs and help them achieve their missions? Virtually all are accustomed to hiring younger workers just starting out in their careers. Given the demographics and the current interest in encore careers, will hiring encore workers become prevalent too?

This survey and focus groups conducted by Hart Research are early steps in our quest for answers from nonprofit employers. In addition, I've traveled in the past few months to six cities to present data and gather input from scores of nonprofit leaders. For many of the people I talked with the term "encore career" was new, but not the idea. Often they said, "I'm in an encore career myself," or mentioned someone their organization hired who, after finishing his or her midlife career, had come looking for more meaningful work.

Most of the nonprofit leaders I talked with hadn't thought about the potential of encore workers to meet staffing needs or advance strategic goals. Their initial reactions typically were mixed—both cautious interest and skeptical push-back.

First, the interest. In person and in our survey, it seems clear that the vast majority of nonprofit leaders are, by and large, open to the idea of hiring encore workers. This survey finds that 50 percent of nonprofits see encore workers as highly appealing (rating them 8-10 on a 10-point scale), with an additional 39 percent finding them moderately appealing (rating them 5-7). Only 10 percent said that the idea of hiring encore workers was not appealing (rating them 0-4). It seems that nonprofit employers find encore workers at least as appealing as workers in other stages of life.

Most interesting, experience with encore workers increases their appeal. I call this the “try it, you'll like it” theory, and I've seen it over and over again. Those who have hired encore workers before generally have had positive experiences, and this encourages them to

As more nonprofits hire encore workers, research shows that they will be predisposed to recruit even more.

do so again. This does not mean that *all* those who have hired encore workers report great experiences—no stage-of-life profile substitutes for finding the right person for a particular job and then engaging him or her successfully. Effective talent management is not that simple. But this scenario does bode well for the future. As more nonprofits hire encore workers, research shows that they will be predisposed to recruit even more.

Some nonprofit leaders are already enthusiastic proponents of hiring encore workers. They see that adding encore talent can improve organizational effectiveness and, as a result, save or raise money. They see the value of a multigenerational workforce, with two-way mentoring (older employees helping younger ones with problem-solving, and younger ones helping older ones with technology skills, for example). They see that creating a new “flexibility paradigm” for how roles and jobs are designed and structured could make nonprofits attractive not only to encore workers, but to younger workers as well, since these bookend generations both strongly desire flexibility.

And they see that some encore workers have capacity-building skills they never thought they could afford—in human resources, development, marketing, information management, evaluation and more. Employers, particularly in the health and education fields, see that encore talent can help ease the gap between workforce needs and the supply of people to do the work. Other employers see that recruiting people interested in encore careers expands the talent pool to find the best candidate for each job they need to fill. They know that a nonprofit that fails to search broadly when filling important positions sells its mission short.

Some nonprofit employers see the value of recruiting employees who understand the needs of older clients. When a wellness campaign dramatically increased the number of older adult members, the YMCA of Greater Rochester changed its recruitment practices and employment policies to engage more 50+ fitness instructors and trainers.



As for the skepticism, there are some repeating themes. Money is the first and most obvious issue for the notoriously underfunded nonprofit sector. In hard economic times, anxiety about resources increases, and as this survey confirms, the cost of hiring is a top employer concern. Can the organization *afford* to invest in human talent management? Is it *too costly* to hire an encore employee?

These are valid questions, but some of the assumptions underlying them are a product of misconceptions that information could ease. For example, encore workers who stay in the job longer can save an organization the cost of additional hiring and training down the road. Similarly, the assumption that an encore worker would expect compensation above a nonprofit's wage scale—to match a previous corporate salary—ignores the drivers for transitioning to an encore career. And the belief that health care costs are inevitably and significantly higher for older workers may be missing the wide range of benefit options and data suggesting, for example, that while costs do increase, the differential in dollar terms is not large.¹

Creating a new 'flexibility paradigm' for how roles and jobs are designed and structured could make nonprofits attractive not only to encore workers, but to younger workers as well.

¹Mermin, G.B.T., Johnson, R.W., & Toder, E.J. (2008, July). *Will Employers Want Aging Boomers?* The Urban Institute, 12-13. www.urban.org/publications/411705.html

Second, anticipated gaps in technology and other skills worry employers who question whether encore workers would be unwilling or unable to learn and adapt to new technology (62 percent in the survey see such reluctance as a serious or moderate concern). On the other hand, the *MetLife Foundation/Civic Ventures Encore Career Survey* tells us that learning new things is a top desire expressed by people interested in encore careers. Moreover, when it comes to making an actual hiring decision, employers can and should screen each job applicant to be confident that he or she is willing to strengthen the skills needed to be successful at work. That way, staffing decisions are based on individual qualities, not group-based stereotypes.

Finally, skeptical nonprofit leaders raise the possibility of unintended consequences. Will hiring more encore workers create glass ceilings that prevent the advancement of mid-career staff? Reduce employment opportunities for younger entry-level people? Lessen pressure to make nonprofit salaries competitive with the for-profit sector (because encore workers may settle for lower nonprofit salaries)? Impede achieving racial diversity? For the most part, these concerns result from a “zero-sum” perspective: Nonprofits will hire encore workers *or* promote from within *or* hire entry level or younger mid-career workers. There is a faint echo in some of these questions of concerns I heard decades ago about women entering the workplace.

So which will it be? What a waste if misconceptions and fear of illusory slippery slopes shut the door to this source of human talent. I hope the questions nonprofits grapple with will quickly shift to *how*, not *whether* nonprofits engage encore talent. It’s certainly fair to ask how nonprofits can benefit from an encore workforce windfall while mitigating the risks of any unintended consequences.

Nonprofit leaders who identify recruiting and hiring the talent they need as a top concern are recognizing the importance of what *Good to Great* author Jim Collins calls “getting the right people on the bus.” The encore talent pool can help nonprofits meet this critical challenge. In fact, encore workers are already doing so at nonprofits across the country. The extent to which their numbers will grow in the coming years depends on whether the nonprofit leaders already on the bus act to capture this opportunity. And what policy makers, communities, educational institutions, funders and others, including encore workers themselves, do to help them. ■

Getting Started

Ask nonprofit leaders how to make hiring more encore workers a reality, and they have no shortage of practical ideas. Here's a list culled from recent meetings and brainstorming sessions across the country.

- Create an online or in-person talent bank to help employers find encore workers. Arizona's got one that certifies employers as "Mature Worker Friendly" and provides job posting and application opportunities for encore workers.
- Start an "encore employment agency"—as an intermediary that finds, recruits, and screens potential candidates and then connects them with potential employers.
- Encourage Workforce Investment Boards (WIBs) to target encore workers. These regional and local boards shape workforce development strategy, help to direct public funding to programs and oversee one-stop career centers, where job seekers can get employment information and employers can access services.
- Create opportunities for encore internships or fellowships to give those in the second half of life a chance to learn more about nonprofits and provide nonprofits a chance to experience how encore workers can help advance their missions.
- Encourage corporations to facilitate encore transitions—through retirement planning, service learning opportunities, life coaching and outplacement assistance.
- Collaborate with other nonprofits to recruit and employ encore workers. Although resources are scarce, especially for smaller nonprofits, adding together the efforts, time, and—yes—wallets of several nonprofits might allow for a combined development effort, for example.
- Think creatively about potential new roles, restructured jobs, and ways to give employees of all ages the flexibility they want and need.
- Partner with others, such as nonprofit associations or local educational institutions, to provide training to close gaps in technology skills.
- Train those who screen resumes to look carefully at nontraditional candidates and understand how to translate potentially valuable life experience.
- Create a diverse, multigenerational workforce and a workplace culture that respects, appreciates and comes to expect the benefits of a staff that includes all ages.
- Advocate for funding to strengthen human talent recruitment and retention—it's just as critical a need in the nonprofit sector as it is for other employers.

— *Phyllis N. Segal and Cal J. Halvorsen*

Executive summary

By Peter D. Hart Research Associates, Inc.

Part one of this research, the *MetLife Foundation/Civic Ventures Encore Career Survey* of more than 3,500 adults between the ages of 44 and 70, found that millions of Americans have already launched encore careers combining personal meaning, social impact and continuing income. It also found that tens of millions of people in this age group are interested in launching encore careers of their own in the future.

Part two of this research, *Tapping Encore Talent: A MetLife Foundation/Civic Ventures Survey of Nonprofit Employers*, takes a look at the job prospects for these tens of millions of boomers. A nationwide telephone survey of 427 nonprofit employers² conducted earlier this year explored two key questions: Are nonprofit employers, so used to hiring young people at the start of their careers, interested in hiring employees who have finished their midlife careers? And what makes nonprofit employers more or less eager to give encore workers a try?

Here are the main findings:

Nonprofit employers find encore workers at least as appealing as workers in other stages of life. Half of nonprofit employers (50%) see encore workers as highly appealing (rating them 8-10 on a 10-point scale), with an additional 39 percent finding them moderately appealing (rating them 5-7). Only 10 percent said that the idea of hiring encore workers was not appealing (rating them 0-4).

Most nonprofits have employed late-career or previously retired workers in the recent past. More than two out of three nonprofit employers (70%) say they have hired encore workers, while nearly all (95%) have employed younger workers just starting out in their careers.

Interest in encore workers is fueled by growing concerns about finding talented staff and managing skilled labor shortages. More than four in 10 nonprofit employers (42%) see recruiting and hiring talent as a top human resource concern. Nearly six in 10 (59%) see recruiting skilled employees as a big challenge. Very few nonprofit employers (9%) expect it will get easier to find the talent they need.

²The sample includes nonprofit employers in the fields of social services, health care/health services, education/youth development (not including schools), plus community agencies, crisis intervention agencies, and advocacy groups working on environmental and other causes. For details, turn to Appendix B, "Profile of Employers Surveyed," on page 35.

Nonprofit employers see the benefits of hiring encore workers. Nearly seven in 10 nonprofit employers (69%) rate the valuable experience encore workers bring to the job as a significant benefit, and 67 percent say the same about encore workers' commitment and reliability. (These percentages include only the "significant benefit" category; if "some benefit" is included, these categories are both at or above 95 percent.)

Nonprofits have concerns about the encore workforce, but no more than one in four sees any of the concerns as "serious." Between one-fifth and one-quarter of nonprofit employers have "serious concerns" that encore workers will demand higher salaries (25%), will be reluctant to learn or adapt to new technology (23%), will lack technical or professional skills (20%), will have higher insurance or benefit costs (19%), or will not stay in the job long (19%).

The perceived cost of encore workers affects their appeal. Only 25 percent of those employers that expect higher costs see encore workers as highly appealing. In contrast, encore workers are highly appealing to 45 percent of the employers that don't anticipate higher costs.

Nonprofits with experience employing late-career or recently retired workers are the most positive about hiring more. Employers with such recent experience are more likely than other nonprofits to view encore workers as very appealing—by a margin of 53 to 40 percent—and are less likely to express serious or moderate concerns. They are also more positive about encore workers who have switched from business to the nonprofit sector (40% to 29%).

Most nonprofits say they already offer a key workplace characteristic important to encore workers—flexible work arrangements. Nine in 10 nonprofit employers (90%) say that they offer part-time work, and 86 percent say they offer flexible schedules to all or some employees. But just 40 percent say they offer employees the flexibility to do work from a mobile office or at home.

A majority of nonprofit employers say they would like help hiring and retaining encore workers. In addition, some nonprofit employers say they would like help finding and screening encore workers (48%), preparing and training encore workers (25%), and providing health insurance or other benefits (22%).

Together, parts one and two of the MetLife Foundation/Civic Ventures research find a congruence of interests between nonprofits with serious recruitment and hiring challenges and baby boomers looking for ways to continue working in jobs that offer meaning and a chance to help others. The fundamentals of supply and demand are present, but will those seeking jobs meet nonprofit employers needing talent? If yes, there will be a massive and multiple payoff—for the nonprofits and their important missions, the encore seekers and our nation. ■

Using a new talent pool to solve old problems

Commentary by Claire Altman and Jess Geevarghese

Claire Altman, immediate past executive director at ReServe Elder Service, Inc., had been with the organization from 2006 to 2008, after two decades as an advocate for affordable housing. Jess Geevarghese, senior program officer at ReServe Elder Service, Inc., has previously worked in the fields of global health public relations and social entrepreneurship.

The availability of millions of talented, experienced people searching for encore careers provides creative nonprofits with an opportunity to search for new ways to tackle problems that may have seemed intractable.

A quick look at the ReServe Health Navigator Program, for example, demonstrates how energetic, capable retirees can extend independent living for elderly people recovering from illness.

Here's the problem: When frail, isolated seniors leave a hospital or rehabilitation facility, they often don't maintain connections with health maintenance and other support services. Without these connections, many older patients are unable to consistently manage even minor medical or life problems and are vulnerable to hospital readmission or frequent emergency room visits.

A recent study by the Commonwealth Fund estimates that hospital readmissions of Medicare recipients within 30 days of discharge cost the Medicare system \$15 billion annually. The study also estimates that 20 percent of those visits could be avoided if effective community-based supports were in place.

The Health Navigator Program is one example of an innovative program that builds upon the skills, experience, and commitment of people in encore careers to help solve a costly public problem.

About a year ago, ReServe launched the Health Navigator Program as a two-year pilot, testing two key notions: 1) that retirees with an interest in delivering direct service to elders could fill a role not currently being met in the health care system, and 2) that by identifying older adults at risk of re-hospitalization and providing them the supports to help them, unnecessary readmissions and emergency room visits could be avoided.

To launch the program, ReServe developed partnerships with two major hospitals in New York City—Beth Israel and St. Luke's Roosevelt, and several major foundations,

including MetLife Foundation, Guttman Foundation and Max & Victoria Dreyfus Foundation, which provided grants to get started. Costs include recruitment, training, and \$10/hour salaries for the part-time Health Navigators.

ReServe's current cadre of Health Navigators is small, but includes people with a diverse range of backgrounds, including professional and executive careers in banking, news media, marketing, health information management, public relations, financial services, and social work.

They seem to find the task compelling and important. "We enter the lives of older people who have no support system, no family or friends. They're isolated and maybe depressed," said one Health Navigator. "We gain their trust and then they allow us to do something for them. We encourage them to look outward, to re-engage with life."

All the Health Navigators are pleased to be able to put the skills they've developed over their careers to continued good use. Most seem to be succeeding by drawing on the judgment, resourcefulness and patience they developed working in positions of significant responsibility and negotiating complex interactions.

After just six months of operations, early results are promising. The Health Navigators are proving effective intermediaries, because of their basic communication and organizing skills, willingness to learn how to provide direct service, and desire to serve in a helping role that allows for a flexible work arrangement.

This program has the potential to help frail seniors, offer fulfilling encore careers, and generate considerable savings.

So effective, in fact, that the New York City Health and Hospitals Corporation recently called upon ReServe to supply six public hospitals with Health Navigators to provide the linkages between frail, older diabetics, their health care providers and specially designed wellness programs at senior centers.

We'll be studying this pilot in great detail over a long period of time, but it's already clear that the payoff can be enormous and far reaching. This program has the potential to provide frail seniors with a way to stay in their homes, offer Health Navigators fulfilling encore careers, and generate considerable savings for the Medicare program—a triple win.

The Health Navigator Program is one example of an innovative program that builds upon the skills, experience, and commitment of people in encore careers to help solve a costly public problem. The countless other public issues that could be addressed by deploying this talent pool is limited only by our imaginations. ■

Strategic alignment for nonprofits? You bet.

Commentary by Marcie Pitt-Catsoupes

Marcie Pitt-Catsoupes is the director of the Sloan Center on Aging & Work. She is also an associate professor at the Boston College Graduate School of Social Work and holds appointments at the Carroll School of Management as well as the Middlesex University School of Business in London.

There is widespread consensus that there will be an increase in the percentage of older adults in the workforce over the coming decade. The Bureau of Labor Statistics predicts an 83.4 percent increase in the numbers of U.S. workers age 65 to 74 from 2006 to 2016 and a 36.5 percent increase among those aged 55-64.

Not surprisingly, surveys of baby boomers typically find that a majority expect to work beyond the age of 62 or 65 years, the time that has in the past signaled retirement for most working adults in our country. And, as noted in the *MetLife Foundation/Civic Ventures Encore Career Survey* released earlier this year, half want to do work that improves the quality of life in their communities.

Which social sector employers will be ready to hire and retain them? The ones that see the need for talent and the value of experience—and the ones that take steps now to become great places for older employees to work.

Employers that want to get ahead of the game should:

Develop excellence in talent management. Talent management refers to an organization's assessment of its needs for particular types of competencies and the ability to take specific steps to ensure that the organization has the people with the right experience and skills. The Sloan Center on Aging & Work has found that, in general, organizations in the social service sector are less likely than those in other sectors to report that talent management is "highly important." This is a warning sign because human capital is the key to the success of virtually every nonprofit organization.

Developing strong talent management capacities includes the periodic assessment of skill sets and competencies needed; the identification of jobs that are critical for organizational success; and clarification of anticipated vacancies, detailing turnover rates by occupations or job families. Good talent management also ensures that employees of all ages and career stages have the experience and training to do their jobs well.

Gain insights about the needs and priorities of today's multigenerational workforce.

While recognizing the diversity within and between groups of employees of different ages, study after study finds that workers of all ages want workplace flexibility. Nonprofit employers will want to remember that there are many types of workplace flexibility,

including different options for schedule flexibility, flexplace, flexible careers, and options for exiting and then re-entering the workplace.

The adoption of flexible work options may give nonprofits a competitive edge in hiring older workers who seek social purpose jobs. A recent study conducted by the Sloan Center on Aging & Work found that social service organizations are more likely than those in other sectors to provide a range of flexible work options to their employees. They are also more likely to link workplace flexibility to business effectiveness.

Close the gap between the workplace that exists and the “ideal” workplace for those seeking encore careers by:

- **Creating an age-friendly work environment.** Employers need to identify factors that might deter older workers from wanting to work for them. In particular, employers will want to determine whether prevailing attitudes, policies and practices convey positive or negative attitudes about older workers. Echoing the findings of this Survey of Nonprofit Employers, the *Sloan Center on Aging & Work* has found that social service employers tend to report more positive attitudes about late-career workers than those in other sectors. Building on these positive attitudes, nonprofits can enhance the age-friendliness of their workplaces.
- **Adopting age-friendly programs and policies.** Organizations often develop programs (both formal and informal) to strengthen employee engagement. Employers may find that some of their programs, such as leadership training or supervisory processes, do not reflect differences in employees’ needs based on age or career stage. Encore career employees will bring significant work experience to the workplace, although they may be early career with regard to their particular nonprofit jobs. Therefore, employers should consider how they might adjust programs so that they are as effective with older workers who are in early career as those programs might be with young workers who are also early career.
- **Promoting positive intergenerational relationships.** Research suggests that employees of different ages and generations often find ways to bridge differences in communication styles and expectations and can work well together. Employers will want to create opportunities for positive interactions and transactions across generations. For example, two-way mentoring programs could be established so that encore career employees can bring their experience to the nonprofit (a benefit identified by nearly two-thirds of the nonprofits that participated in the *Survey of Nonprofit Employers*), while other employees, perhaps younger ones, can share their knowledge about the nonprofit world.

Social service organizations are more likely than those in other industry sectors to be in a good position to seize the opportunity to engage older workers.

The Sloan Center on Aging & Work has found that social service organizations are more likely than those in other industry sectors to be in a good position to seize the opportunity to engage older workers, including those transitioning into encore careers. For-profit or nonprofit, it makes good business sense to do so. ■

Great people making great teams equal great results

Commentary by Tom Tierney

Tom Tierney is chairman and co-founder of The Bridgespan Group, an independent nonprofit organization whose mission is to strengthen the ability of nonprofit organizations and philanthropy to achieve breakthrough results.

Great organizations happen because of great people, and the staggering need over the next decade or more for great people to fill leadership positions is one of the most critical challenges nonprofit organizations face. Two years ago Bridgespan's report, *The Nonprofit Sector's Leadership Deficit*, projected that 640,000 new senior managers would be needed in the sector between 2006 and 2016. The shortfall is too large to be filled exclusively from within the current ranks of nonprofit organizations or even the sector; bench strength is simply inadequate to accommodate growing demand.

The *MetLife Foundation/Civic Ventures Survey of Nonprofit Employers* shows that recruiting and hiring talent are rated a top human resource challenge. We urge nonprofit leaders to pay attention to the implications of the leadership deficit, to the millions interested in encore careers, and to a few key lessons below.

Throughout our economy there is more mobility around talent than ever before—and that includes career-switchers. The large talent pool of women and men interested in encore careers potentially expands the number of candidates available for nonprofit leadership and frontline positions. It is in the sector's interest to encourage them, especially those with functional expertise (e.g., operations, finance, human resources, and marketing). When it comes to high-level managers, corporate bridgers offer the skills and leadership experience many nonprofits need in these areas.

Nonprofits must cast a big net. An effective recruitment strategy for a key leadership position should be seen on a long runway. These choices should not be made for the sake of expediency. New intermediaries like The Bridgespan Group and its Bridgestar initiative, among others, are beginning to enhance nonprofits' recruiting capacity by helping them recruit from a broad talent pool.

Cloning prior staff—and especially prior leaders—may feel safe, but it doesn't necessarily prepare an organization for the challenges of the future.

Nonprofits should be leaders in recruiting people of all ages and diverse backgrounds. This means recruiting from outside when required, while also working to retain top employees. Employers need to avoid Jim Collins' "tyranny of the 'OR'" from *Built to Last*—thinking that they can *either* find their leaders within their organization and elsewhere in the nonprofit sector *or* by looking outside, among younger people *or* older people looking for an encore career. Nonprofits can and should look in *all* places, because responsibly carrying out their missions requires them to find the best. And successful organizations thrive on diversity of experience and perspective.

Nonprofits need to put skepticism, however understandable, aside and be open to career-switchers. To build strong organizations, nonprofits would be shortsighted to turn away from the large potential talent source currently outside the sector. For instance, they would be foolish to screen out an encore career professional with relevant experience just because she hadn't previously worked in a nonprofit. Cloning prior staff—and especially prior leaders—may feel safe, but it doesn't necessarily prepare an organization for the challenges of the future.

Organizations underestimate the importance of their culture at their peril. Culture is the everyday; it shapes how organizations function and interact and defines behavior. Nonprofits must screen for candidates who, beyond having the right skills and experience, will fit the organizational culture and eventually become culture carriers themselves.

It's time for nonprofits and their funders to increase investments in human talent.

Career-switchers can contribute to an organization's culture of mentoring—and success. The secret sauce in organization-building extends to developing employees and includes a culture of mentoring—where mentors and mentees learn from each other. This is an avenue for success with career-switchers who can teach and bring new skills while also learning about the organization and its culture. When the culture of an organization supports and promotes mentoring, the benefits go both ways.

Nonprofits must recognize the elephant in the room: Recruiting and retaining the best requires a serious investment. There's no other way. Business lives with this premise everyday, but the nonprofit world is often short on resources to invest in training and development, employee support, and rigorous recruitment strategies. Such investment is essential. It's time for nonprofits and their funders to increase investments in human talent. This is more than a human resource challenge; it needs to be accepted as an organizational priority and strategic imperative from the top down.

None of this is easy, but it has to be done if organizations hope to deliver real impact. ■

Encore talent meets the citizen sector

Commentary by Diana Wells

Diana Wells is president of Ashoka, the world's largest association of leading social entrepreneurs. A nonprofit organization, Ashoka has 200 employees worldwide.

At Ashoka we believe that all people can be changemakers when they grant themselves full permission to fix the key elements of our society that are broken. Yet we know that the most common barrier to more people doing so is the lack of permission they give themselves to make this life change—a barrier frequently related to preconceived notions of which kind of people drive change at which times in their lives.

Fortunately, more and more people are challenging these preconceived notions. As Marc Freedman argues in his insightful book, *Encore: Finding Work That Matters in the Second Half of Life*, a new life map is emerging, one that allows today's 30-year-olds to see multiple careers stretching out for decades and today's 60-year-olds to see 15 years or more of productive, engaged work ahead. The advent of the encore career is indeed a cornerstone in unlocking changemaking for Americans across a wide range of ages.

Another historical piece is falling into place as well. A new and vibrant sector is emerging to attract many encore career professionals and entrepreneurs and vie for their talent. In America and in many parts of the world, the emergence of the “citizen”—or social purpose—sector is creating an enormous shift in the way people organize themselves to tackle some of the world's most intractable human and environmental challenges.

The advent of the encore career is indeed a cornerstone in unlocking changemaking for Americans across a wide range of ages.

The last 30 years demonstrate this global phenomenon. For example, Brazil had fewer than 5,000 citizen organizations in 1980; just 20 years later, it had over a million. A similar recent surge is evident in societies across the developed and developing world. Once a demoralized sector with a reputation for inefficiency, the citizen sector is gaining in productivity and vibrancy, and now attracts the best talent—from recent university graduates to mid-career and encore career professionals and entrepreneurs.

Citizen sector employers are uniquely equipped to deliver to those entering encore careers what they are looking for—the chance to plug into truly meaningful work, from staffing a new energy sector to mentoring new citizens. And there are so many roles and jobs to fill—from creating new organizations to working within existing ones, from marketing to mobilizing to management.

Employers in this sector also stand to reap enormous benefits from this new talent pool. Let's look at Ashoka as an example.

As an organization devoted to transforming societies by supporting entrepreneurial, sector-bridging approaches to social change, Ashoka has designed a focused talent-searching strategy. Knowing the power of entrepreneurs to create systemic change, we are building a team of entrepreneurs from all different sectors and walks of life.

We seek out candidates who have been successful entrepreneurs or innovators within existing institutions and are now transitioning to encore careers—some are in their middle forties, others are later in life. They have been management consultants, business entrepreneurs, finance professionals, and so on, but all share the quality of having started or built a significant movement, innovation or institution. Here, they find a high-quality community of peers, allowing them to have greater impact than they might have as solo actors in the world. And Ashoka gains from the wealth of perspective, talent, and life as well as professional experience that these individuals bring. The cross-generational empathy that encore career entrepreneurs bring has provided Ashoka with critical insights to team-building, scaling institutions, and social change processes—to give just a few important examples.

Ashoka is hardly the only citizen sector employer recognizing and capitalizing on the trend toward encore careers. Citizen sector employers are harnessing encore talent for a host of critical roles—mentoring young entrepreneurs starting their first ventures, training a new workforce to retrofit homes for solar, serving as nurses or doctors in inner cities here and conflict zones abroad, and teaching math and science in public schools.

It's becoming clear to many employers that tapping encore talent offers a key competitive advantage as encore talent increases employers' efficacy, extends their reach and impact, and strengthens a team to deliver a desired result. This has certainly been Ashoka's experience—and one that doesn't surprise us as it so clearly fits with our commitment to build a world where everyone is a changemaker. ■

Tapping encore talent offers a key competitive advantage as encore talent increases employers' efficacy, extends their reach and impact, and strengthens a team to deliver a desired result.

Peter D. Hart Research Associates, Inc.

Nonprofits assess the appeal of hiring encore workers



Boomers' interest in meaningful work is clear. The *MetLife Foundation/Civic Ventures Encore Career Survey* published in June 2008 found that more than half of Americans age 44 to 70 are either interested or already engaged in encore careers—jobs that combine personal meaning, social impact, and continued income.

The nonprofit sector needs employees. It's growing faster than business or government—and its need for human talent is growing, too.

People seeking work. Employers seeking employees. It should be a match made in heaven. But are nonprofit employers, the most likely employers to provide meaningful work with social impact, interested in those who have finished their midlife careers?

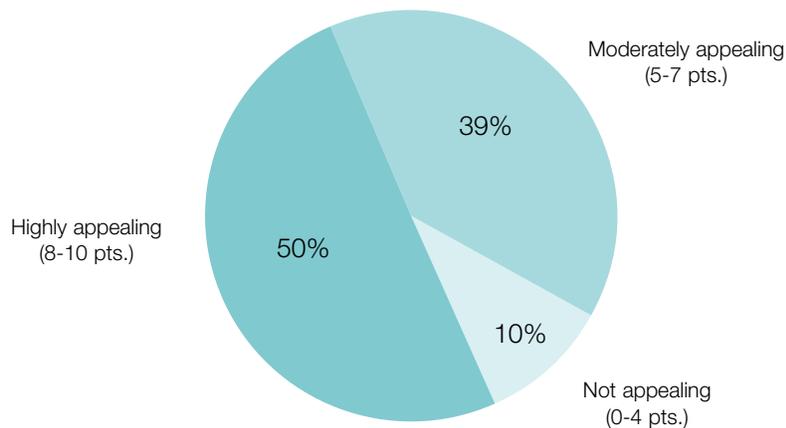
With support from MetLife Foundation, Civic Ventures sought answers. This survey is the first to ask hundreds (427 to be exact) of nonprofits with social impact missions about their views on employing encore workers. The results are encouraging and suggest that it is in our nation's interest to connect this supply with demand.

Nonprofit employers find encore workers as appealing as or more appealing than workers in other stages of life.

Half of the 427 nonprofit employers interviewed in this survey find the idea of employing encore workers highly appealing. When asked about the desirability of “late-career or previously retired workers who have changed the type of work they do and want to contribute toward the public good by working for an organization like yours,” one out of two gives high ratings to this category of employees. Another 39 percent find encore workers moderately appealing.

Appeal of encore workers

*Thinking about late-career or previously retired workers who have changed the type of work they do and want to contribute toward the public good by working for an organization like yours, how appealing would you view these types of applicants for the jobs you most need to fill?**



**Ratings are on a zero- to 10-point scale, with “10” meaning that the type of worker is very appealing and a “zero” meaning this worker is not appealing at all. Answers may not add up to 100% due to rounding and those who answered “Cannot rate.”*



This view of encore workers closely matches the appeal of workers in the middle of their careers. Nonprofit employers give both categories an average rating of 7.3 on a zero- to 10-point scale—with “10” being the most appealing. Workers who are just starting their careers are a bit less appealing, receiving a lower rating (average 6.8) from the same nonprofit employers.

Appeal of different types of workers

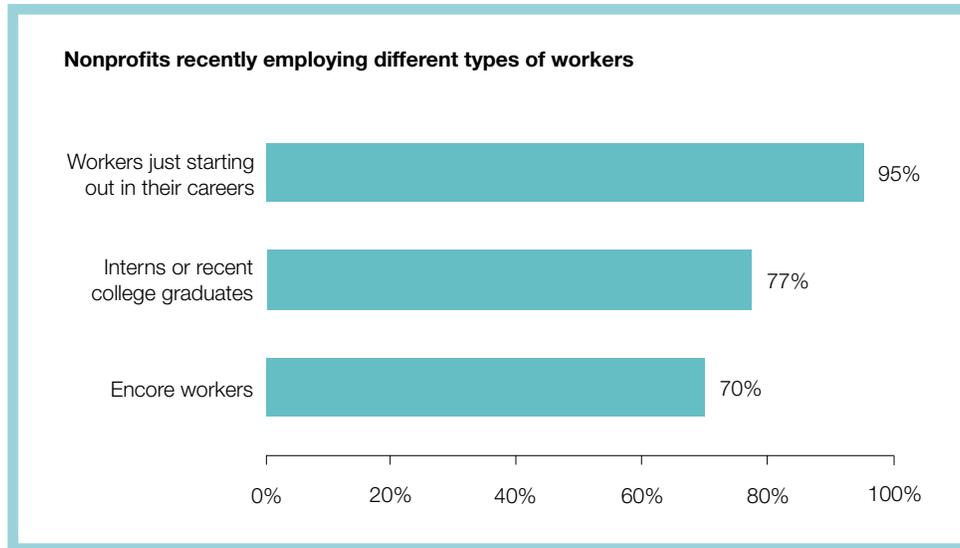
*Rating Appeal of Selected Types of Workers**

	Average rating	Highly appealing (8-10 pts.)	Moderately appealing (5-7 pts.)	Not appealing (0-4 pts.)
Workers who are in the middle of their careers	7.3	54%	36%	8%
Late-career or previously retired workers who have changed the type of work they do and want to contribute toward the public good by working for an organization like yours	7.3	50%	39%	10%
Late-career or previously retired workers	7.2	47%	42%	8%
Workers who are just starting out in their careers	6.8	39%	46%	14%

**Ratings are on a zero- to 10-point scale, with “10” meaning that the type of worker is very appealing and a “zero” meaning this worker is not appealing at all. Answers may not add up to 100% due to rounding and those who answered “Cannot rate.”*

Nonprofit employers base their ratings on experience, as most have employed late-career or recently retired workers in the recent past.

More than two out of three nonprofits (70%) say they have had experience in the past few years employing late-career or previously retired workers. While this is a substantial majority of nonprofits, it is less than those that have employed interns who are in college or are recent graduates (77%). Nearly all nonprofits (95%) have employed younger workers just starting out in their careers.



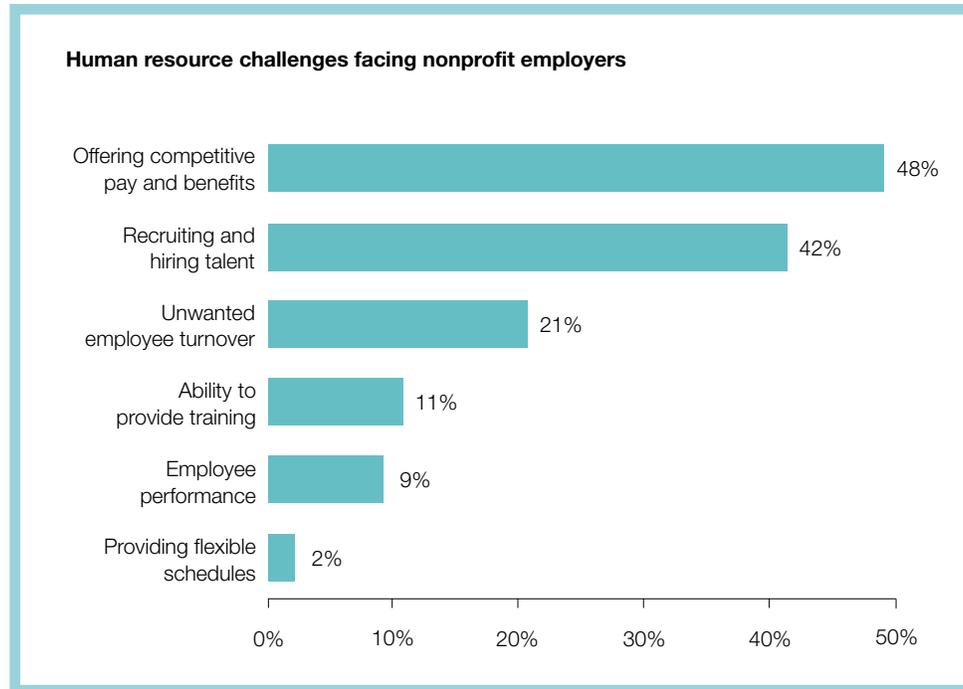
All major segments of nonprofits surveyed report equally high levels of experience in employing encore workers—education and youth (67%), health (67%), and social services (71%). The largest nonprofits, however, are most likely to report that they have employed late-career or previously retired workers in the past few years. This is the case for:

- 85% of nonprofits with more than 250 employees
- 65% of nonprofits with 101 to 250 employees
- 68% of nonprofits with 26 to 100 employees
- 62% of nonprofits with 15 to 25 employees.

As described on pages 27 and 28, the nonprofits with such recent experience are the most positive about encore workers.

Interest in encore workers is fueled by growing concerns about finding talented staff and handling shortages of skilled labor.

Forty-two percent (42%) of nonprofits see recruiting and hiring talent as a top human resource concern, and few expect it to get easier. In fact, only the ability to provide competitive pay and benefits concerns nonprofits more. The recruitment challenge affects employers in all areas of the nonprofit universe surveyed, but is particularly acute for organizations in the health field (55%), where it is ranked as the greatest challenge.



Very few nonprofit employers (9%) expect it will get easier to find the talent they need. The rest are evenly divided on whether they see this getting harder or staying about the same (45% each). When employers who see recruitment getting harder are asked why, they most often cite skills shortages and not enough young adults being interested in nonprofit work (both at 31%).

As for the types of positions nonprofits consider most challenging for their organization to fill, most employers interviewed (59%) say recruiting skilled employees is a challenge to a great or moderate extent. A majority (55%) says this about employees who are certified or licensed and ones who can provide direct services. Employers in the health field are particularly concerned about finding certified and licensed employees (64%).

There is less concern about other types of staff. Fewer than half of the nonprofits interviewed express concern about recruiting mid-level managers (43%), executives and senior managers (42%), and support staff (38%).

Staffing challenges

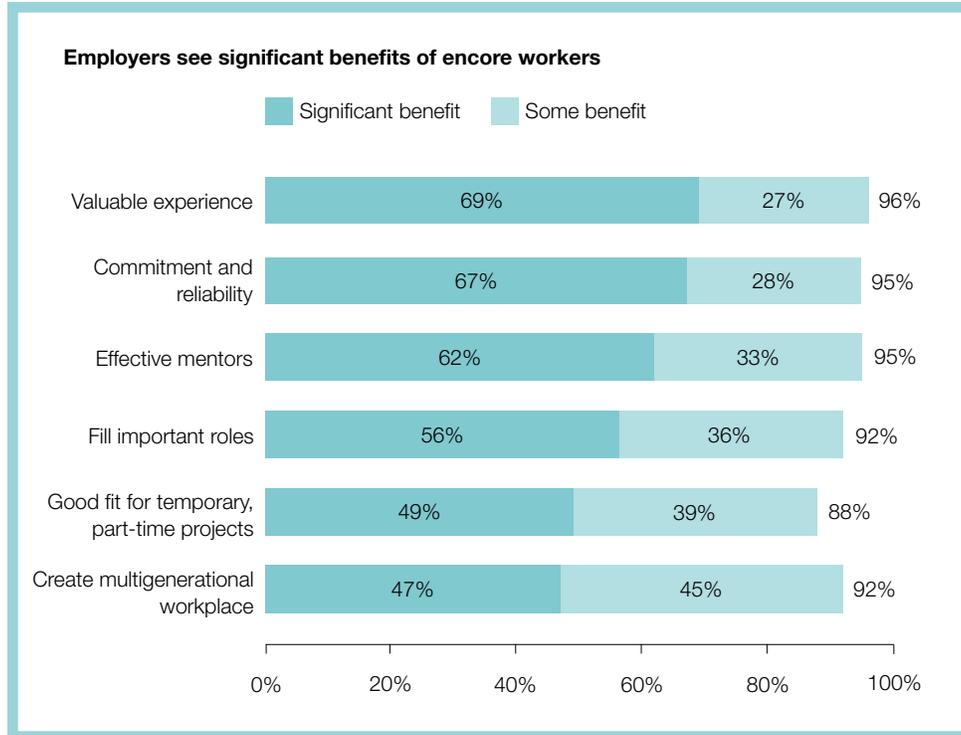
How much of a challenge is each category of employee for your organization to fill—not a challenge at all, a challenge to a limited extent, a challenge to a moderate extent, or a challenge to a great extent?

	To a great extent	To a moderate extent	Total
Skilled employees	17%	42%	59%
Certified or licensed employees	22%	33%	55%
Providers of direct services	16%	39%	55%
Mid-level managers	8%	35%	43%
Executives and senior managers	15%	27%	42%
Support staff	12%	26%	38%

Most nonprofits see the benefits of encore workers.

A majority of nonprofit employers see the benefits of an experienced workforce and rate them as significant.

- **Experience.** More than two out of three employers (69%) see the “valuable experience” that encore workers could bring to the job as a significant benefit to their organization.
- **Commitment and reliability.** Two out of three employers (67%) view the “commitment and reliability” encore workers can bring “at this stage of their work lives” as a significant benefit to their organization. In the focus group discussions, some nonprofit managers expressed frustration with the short tenure common among younger workers and an appreciation for older workers’ willingness to make a commitment to one organization (even if others wondered how long encore workers would stay on the job, as reported on page 25).
- **Intergenerational.** More than three in five employers (62%) consider it a significant benefit that encore workers “can be effective mentors for younger employees.”
- **Filling important roles.** More than half of the employers surveyed (56%) see the potential benefit in having encore workers “fill important roles.”



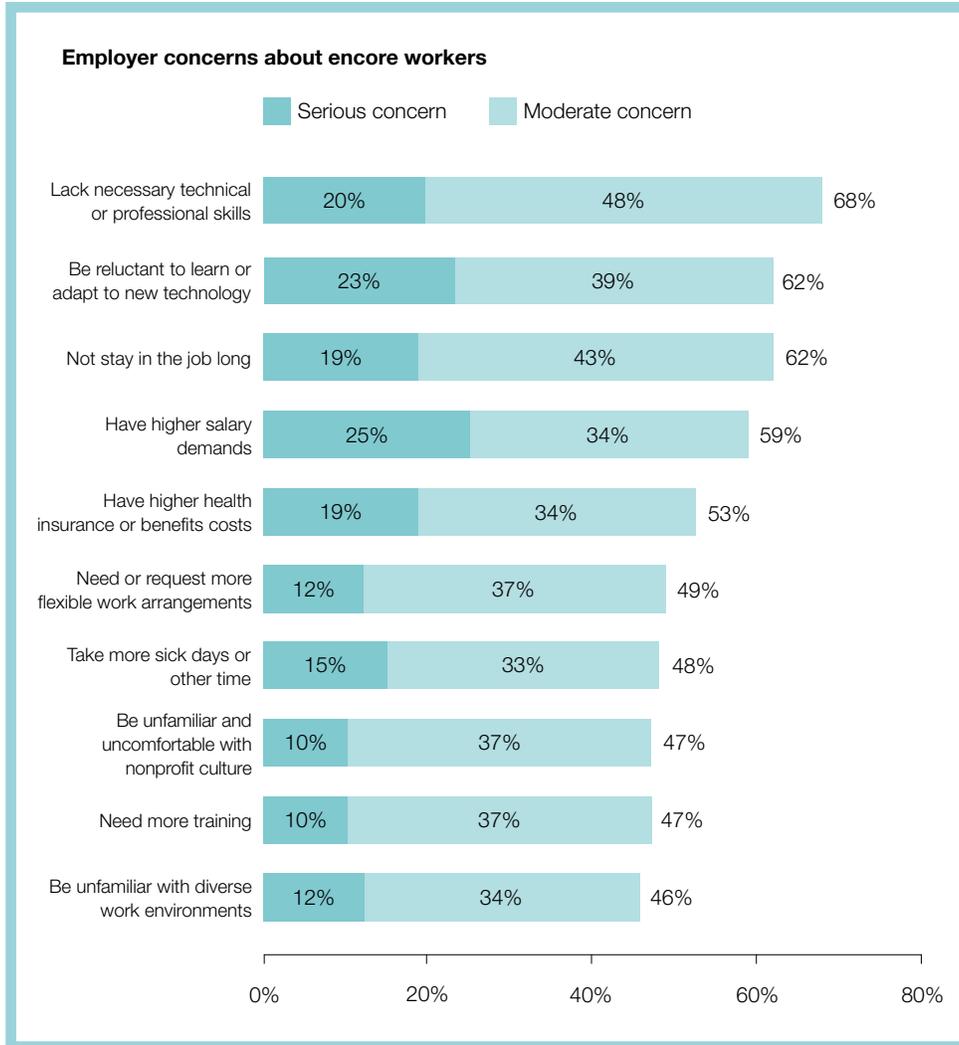
Nonprofits do have concerns about encore workers.

Nonprofit employers express some concerns about hiring people in encore careers—though no more than one in four sees any of these concerns as “serious.” Contrasting this with the consistently larger proportion of nonprofits seeing benefits as “significant,” there seems to be less intensity over concerns than expected value from benefits.

But there are differences based on nonprofit size. The largest nonprofits—those with more than 250 employees—are more concerned than other nonprofits about encore workers’ technical and professional skills: 75 percent of these employers express serious or moderate concern about their skill levels, and 66 percent express concern about whether they would learn and adapt to new technology.

By contrast, the smallest nonprofits—those with 15 to 25 employees—are more concerned than others about turnover, costs and cultural adaptation: 72 percent of these employers are seriously or moderately concerned about how long encore workers would stay on the job, 66 percent about salary demands, 62 percent about health insurance and benefit costs, and 57 percent about the ability to adapt to a diverse work environment.

Looking at all nonprofits, the greatest concerns are around gaps in skills. Just over two out of three nonprofit employers (68%) express a serious or moderate concern that encore workers would lack the necessary technical or professional skills. When asked whether encore workers would be reluctant to learn and adapt to new technology, more than three in five (62%) say this is a serious or moderate concern.



Other areas of concern in addition to direct compensation costs (discussed on page 26) include:

- Job tenure:** Staff turnover clearly frustrates human resource managers. Even though many see reliability and commitment as positive attributes of experienced workers (as reported on page 23), many also worry about how long these employees would likely stay on the job. Roughly three in five (61%) view this as a serious or moderate concern.
- Job training:** The prospect that encore workers would need more training than other workers concerns 47 percent of employers, with health sector employers the most concerned about this (58%). At the same time, nonprofit employers report that providing training to their workforce is a common practice: 71 percent of the employers interviewed report that they offer job training to all employees. In addition, one out of two nonprofits (50%) already offers tuition benefits to at least some of their employees and another 22 percent say they would consider it.

- **Need for flexibility:** The prospect that encore workers would need or request more flexible work arrangements than typically provided or that employers are comfortable with is a serious (12%) or moderate (37%) concern to about half of respondents. As discussed on pages 29 and 30, however, a significant portion of nonprofits say they have already adopted flexible workplace practices or are open to doing this.
- **Fit with nonprofit culture:** The possibility that encore workers would be uncomfortable with nonprofit culture is a serious or moderate concern for just under half (47%) of employers. Similarly, the prospect that encore workers would be unfamiliar with diverse work environments is a serious or moderate concern among 46 percent of employers.

Concerns about compensation affect the appeal of encore workers.

Managers report serious (25%) and moderate (34%) concerns that encore workers would have higher salary demands than other employees. A majority (53%) also expressed concern about the cost of health insurance and benefits for encore workers.

Despite these concerns, when asked directly about their expectations about total compensation (salary and benefits) for encore workers compared to other employees doing the same work, most nonprofits (64%) say they expect that the costs would be about the same. Only one out of five (21%) expect it would be more expensive to hire encore workers.

Expectations and concerns about the direct labor cost of encore workers correlate with how appealing they are to nonprofits. Only 25 percent of those employers that expect higher costs see encore workers as highly appealing. In contrast, encore workers are highly appealing to 45 percent of the nonprofits that don't anticipate higher costs.

As a final indication of nonprofit concerns about direct labor costs, the late-career workers seen as most appealing are those described as "willing to work for your organization for less than their previous salary." Conversely, the encore workers seen as least appealing are those making the most pronounced change—from the for-profit sector to the nonprofit sector, or to work that is "entirely different."

Types of late-career workers seen as “highly appealing” to employers

*Rating appeal of selected types of late-career workers as 8-10**

Late-career or previously retired workers willing to work for your organization for less than their previous salary	57%
Late-career or previously retired workers who have changed the type of work they do and want to contribute toward the public good by working for an organization like yours.	50%
Late-career or previously retired workers who have made a change from work in the for-profit sector to work in the nonprofit sector	40%
Late-career or previously retired workers who want to do work that is entirely different from what they have been doing	35%

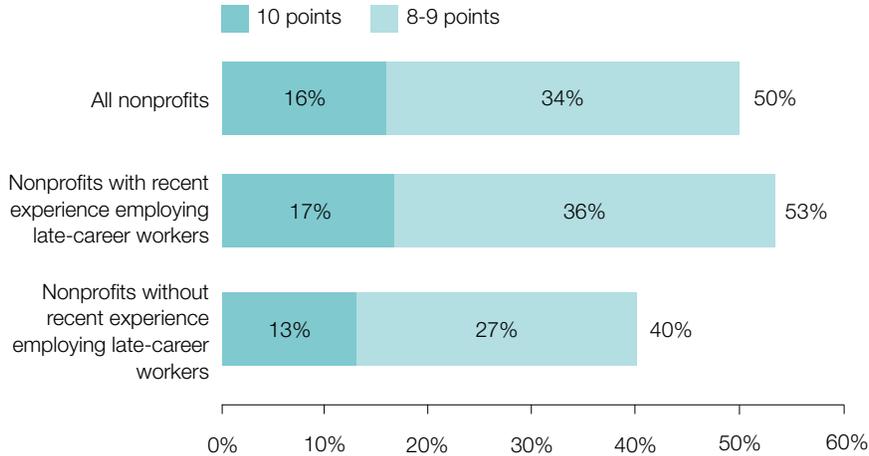
**Ratings are on a zero- to 10-point scale, with “10” meaning that the type of worker is very appealing and a “zero” meaning this worker is not appealing at all.*

Nonprofits that have employed encore workers have positive feelings about hiring more.

Fifty-three percent (53%) of nonprofits that have recently employed late-career workers find this category of potential employees highly appealing (rated 8-10 on a 0-10 point scale), while only eight percent do not find them appealing (rated 0-4). In contrast, 40 percent of employers without this experience see encore workers as very appealing, while 17 percent say they are not appealing.

Those with experienced workers open to hiring more

Thinking about late-career or previously retired workers who have changed the type of work they do and want to contribute toward the public good by working for an organization like yours, how appealing would you view these types of applicants for the jobs you most need to fill?



Consistent with this pattern, nonprofits that have recently employed late-career workers are more positive about those who have switched from the for-profit to the nonprofit sector. Among those nonprofits with such experience, 44 percent give at least an “8” rating to sector-switchers. Those without experience are less enthusiastic, with only 29 percent rating sector-switchers as high.

The same pattern holds when asking about the benefits and concerns nonprofits have about hiring encore workers. The more experience they’ve had with this population, the more positive they are.

Although the differences are not large, those with experience employing encore workers are more likely to see the potential benefits of encore workers as significant. This pattern holds on five of the six characteristics probed.

Similarly, on seven out of 10 concerns probed in this survey, nonprofits that have recently employed late-career workers seem less worried than other employers about bringing encore workers into their organization. This contrast is most pronounced when it comes to the ability of encore workers to adapt to their organization’s culture—only 44 percent of employers with late-career worker experience express serious or moderate concern that encore workers would be unfamiliar and uncomfortable with nonprofit culture (compared to 57 percent of other nonprofits).

Concerns of employers about encore workers

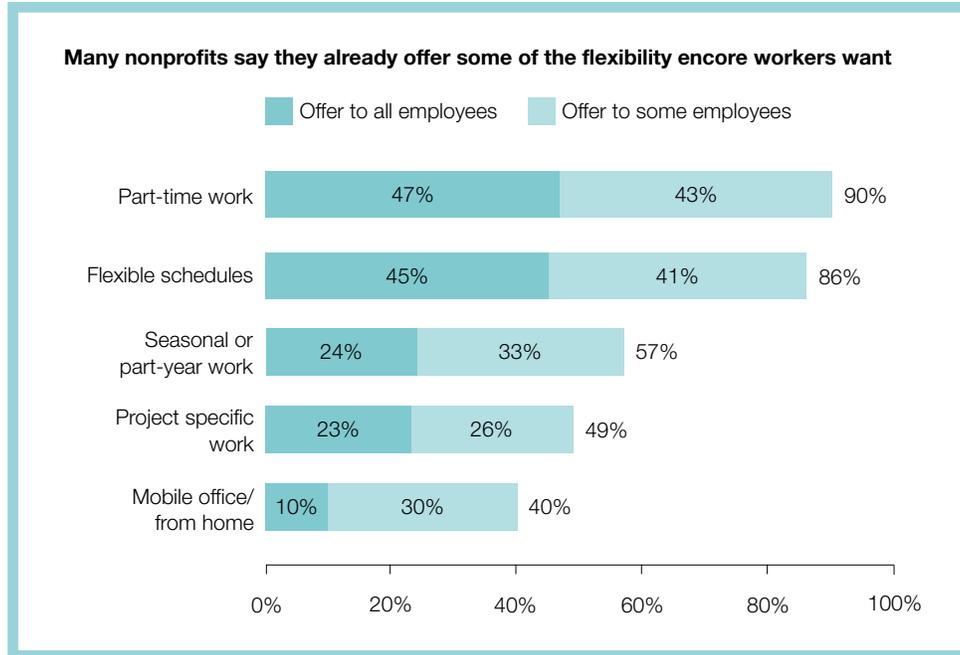
Proportion who say serious or moderate concern

	All employers	Have had experience with late-career workers	Have NOT had experience with late-career workers
Would lack necessary technical or professional skills, or their skills may not be up to date	68%	67%	67%
Would be reluctant to learn or adapt to new technology	62%	64%	56%
Would not stay in the job long	62%	61%	63%
Would have higher salary demands than other workers	59%	57%	61%
Would have higher health insurance or benefit costs than other workers	53%	52%	56%
Would need or request more flexible work arrangements than you typically provide or are comfortable with	49%	46%	52%
Would take more sick days or other time off than other workers	48%	46%	52%
Would be unfamiliar and uncomfortable with nonprofit culture	47%	44%	57%
Would need more training than other workers	47%	45%	51%
Would be unfamiliar with diverse work environments	46%	40%	56%

Many nonprofit employers say they already offer workplace flexibility—a big draw for employees of all ages.

Most nonprofits report that they are already offering flexible types of work arrangements including part-time, part-year employment and job-location flexibility to some or all their employees.

- **Part-time work.** Nearly half (47%) of the nonprofit employers interviewed say they offer part-time work to all their employees, and another 43 percent say they offer it to some.
- **Flexible schedules.** Flexible schedules are also quite prevalent among nonprofit employers. Nearly half (45%) say they offer flexible schedules to all their employees already, with another 41 percent saying they offer it to some.
- **Seasonal or part-year work.** Seasonal or part-year work is less common, but more than half of nonprofit employers (57%) say they already offer this to at least some of their staff (including the 24 percent who say they offer it to all employees). Another one in six (17%) would consider the idea. However, one-quarter of employers (24%) are not open to the idea. Employers whose work focuses on service delivery are more likely to offer seasonal opportunities for employees (63%) than those organizations that also engage in advocacy (50%).
- **Project-based work.** Half (49%) of nonprofit employers say they offer job opportunities based around a specific project or specified timeframe to all (23%) or some (26%) of their employees. Another 22% are open to the idea, but one-fifth (20%) say they would not consider it.
- **Telecommuting.** The least popular option is allowing people to work from home, though 40 percent say they already allow at least some of their staff to do so, while another 21 percent would consider it. However, two in five (39%) say they would not consider it at all.



Nonprofit employers would like help finding encore workers

A majority of all employers (53%) told interviewers they were very (26%) or fairly (27%) interested in no-cost help finding and retaining encore workers. Not surprisingly, employers who see encore workers as very appealing are more likely to be interested in such assistance.

About half of the nonprofits surveyed (48%) also report an interest in help recruiting and screening encore workers. Some (25%) also see a potential benefit from programs that will help prepare and train encore workers. Relatively few would look to outside help to provide age diversity training (15%) or design jobs and schedules (11%).

Hart Research has completed two surveys for Civic Ventures in 2008, and the overall conclusion seems a simple one: Boomers want to do work that brings them a sense of purpose and meaning, and nonprofit employers are more than open to the idea of engaging them in the work that needs to be done. ■

Resources for employers

Civic Ventures convened discussions with close to 100 nonprofit executives in six cities—Hartford, New York, Phoenix, St. Louis, Dallas, and Washington, D.C.—from June through September 2008 to discuss the survey results and ask about the steps involved in moving from interest to action capturing the encore career workforce potential.

The print and web resources listed below provide general information, tools, and best practice examples on topics including talent needs assessment, recruitment, hiring, and workplace flexibility. Most of these resources are expressly about encore or mature workers. Some were created specifically to help nonprofit employers. All offer useful insights and practical tools to all employers interested in effective workforce management.

An expanded menu of resources will be published soon on www.encore.org. Visitors will be invited to send ideas about additional resources and comments on which resources are most helpful. To send comments now, write to info@civicventures.org.

AARP Workforce Assessment Tool. (AARP, 2008). This online interactive questionnaire designed for all employers analyzes information submitted about current demographics and capacities, then generates a tailored report describing the potential impact of the aging workforce, workplace strengths, current employment practices, areas for improvement, and steps to create an “age-friendly” workplace. www.aarpworkforceassessment.org.

Capturing Experience: How People 50+ Can Help Your Organization. (Center for Intergenerational Learning, Temple University, 2008). This online tutorial for nonprofit employers has interactive tools to assess capabilities and take action on topics including marketing to and recruiting 50+ adults, job “sculpting,” and retaining an experienced paid and unpaid workforce. cil.templecil.org.

Caring Workplaces, Committed Employees Resource Center. (National Human Services Assembly, 2008). This online resource includes assessment tools, case studies, research summaries, and guidance for human-services nonprofits about work-life topics and ways to support a multigenerational workforce. www.nassembly.org/fspc/CaringWorkplacesInitiative/index.html.

Grey Skies, Silver Linings: How Companies are Forecasting, Recruiting, and Managing a Mature Workforce. (The Conference Board, 2007). This study includes 10 case studies of nonprofit and for-profit employers, explaining how each engages, retains, and recruits mature workers. www.conference-board.org/publications/tcbproduct.cfm?pubid=R-1409-07-KF.

Hiring Toolkit: Navigating the Hiring Process. (Bridgestar, 2006). Toolkit topics include creating job descriptions, developing a candidate pool, screening and interviewing candidates, and finalizing a choice. Especially helpful for nonprofits recruiting candidates from the corporate sector. www.bridgestar.org/Resources/Toolkits/Recruiting/Tools.aspx.

HR Focus Areas. (Idealist.org, 2008). This extensive HR resource directory for nonprofit organizations includes information about compensation and benefits, cultural diversity, employment law, organizational culture, and management. www.idealists.org/hrp/hrresourcesindex.html.

Managing a Multi-Generational Workforce. (National Council on Aging's MaturityWorks Alliance, 2007). This two-part webinar for nonprofits includes practical suggestions for how to manage across generations. www.ncoa.org/content.cfm?sectionID=379&detail=2040.

MetLife Foundation/Civic Ventures BreakThrough Award Report. (Civic Ventures, 2007). This report profiles 10 nonprofits engaging experienced workers to help meet their missions. www.civicventures.org/breakthrough.

MetLife Foundation/Civic Ventures Encore Career Survey. (Civic Ventures, 2008). First-ever survey of adults 44-70 who are in, or interested in beginning, an encore career. www.civicventures.org/publications/surveys/encore-career-survey.cfm.

Stages: Business Effects of Extended Labor Force Participation. (Sloan Center on Aging & Work at Boston College, 2008). This report explains current older worker trends and provides an awareness, assessment, and action model for employers to follow. agingandwork.bc.edu/template_2008-09_tools.

The 10 Commandments of Employee Onboarding. (CareerBuilder.com). This online resource explains why employers should take the time to welcome and orient new employees and gives ten "onboarding" best practices. For all ages and all employers. www.careerbuilder.com/jobposter/small-business/article.aspx?articleid=ATL_0192ONBOARDINGTIPS_s.

When Work Works: Workplace Flexibility Toolkit. (Families and Work Institute, 2008). An overview for all employers about workplace flexibility practices, best practices to introduce flexibility programs, how to handle challenges such as manager resistance, and how to measure results. familiesandwork.org/3w/toolkit/webpage-toolkit.html.

Workforce Crisis: How to Beat the Coming Shortage of Skills and Talent, by K. Dychtwald, T. Erickson, & R. Morison. (Harvard Business School Press, 2006). This book provides research and how-to information for employers that want to attract, engage, and retain a multigenerational workforce. Order through www.amazon.com, www.barnesandnoble.com, or local bookstores.

Workforce Planning Process. (Cornerstones for Kids, 2008). This guide includes, among other tools and resources, a gap analysis to identify the differences between your current workforce and the workforce you need in the future, along with gap-closing strategies. portal.cornerstones4kids.org.

Working Longer: New Strategies for Managing, Training, and Retaining Older Employees, by W. Rothwell, H. Sterns, D. Spokus, & J. Reaser. (AMACOM, 2008). This guide includes research, worksheets, and recommended resources to improve utilization of older workers. Topics include workplace design and training. Order through www.amazon.com, www.barnesandnoble.com, or local bookstores.

Appendix A

Research methods

The MetLife Foundation/Civic Ventures Survey of Nonprofit Employers includes both quantitative and qualitative research conducted by Peter D. Hart Research Associates, Inc., from February to April 2008.

Quantitative Research

Hart Research interviewed 427 nonprofit employers by telephone from March 27 to April 18. The sample was based on a list provided by the well-respected national list management firm infoUSA. The sample consisted of 186 employers in the field of social services, 98 in the field of health care/health services, 33 in the field of education/youth development (exclusive of schools), and 109 in other fields, such as the environment, community action agencies, and crisis intervention agencies.

The list was compiled using select Standard Industry Classification (SIC) codes, a system instituted by the federal government for classifying industries. SIC codes were chosen to reach organizations in specific nonprofit fields.

Selected telephone numbers were called randomly with the sample structured to ensure appropriate geographic representation. Potential respondents on the list were called back up to five times.

Hart Research developed the questionnaire with extensive consultation from Civic Ventures and its external research advisors. Respondents were screened to ensure that they worked at a 501(c)(3) or 501(c)(4) organization, and that they were the most senior person responsible for setting human resources policy for their organization. All respondents worked at organizations with at least 15 employees, and a quota was established to ensure that half worked for organizations with more than 100 employees.

Qualitative Research

The qualitative research included two focus group sessions and four individual in-depth interviews. Hart Research collaborated with Civic Ventures staff and others to develop discussion outlines for the focus groups and in-depth interviews. Participant recruitment was handled by staff at the focus group facilities under the direction and supervision of Hart Research staff. Allan Rivlin and Maeve Ward led the Hart Research team and moderated all focus groups and in-depth interviews.

Two focus group sessions with nonprofit employers

The first focus group session took place in New York City on February 5, the second in Richmond, Virginia, on February 28. Both groups included 10 to 12 adults. Each session lasted two hours. All participants were required to:

- be in charge of hiring and staffing at a nonprofit organization, either as a human resources director or manager, or as the executive director or chief administrator; and
- have at least 15 employees working at their organization.

Individual in-depth telephone interviews

Four individual in-depth interviews were conducted with social entrepreneurs who are in encore careers themselves and who work in nonprofit organizations that could employ people in encore careers. These individuals were selected from a pool of Civic Ventures Purpose Prize winners. The Purpose Prize is an award given to social innovators over age 60 who use their creativity and experience to address critical social problems.

A note about employer focus groups following the collection of data by Hart Research

Following the completion of the qualitative and quantitative research conducted by Hart Research, two types of nonprofit employer focus groups were convened to discuss issues framed by the initial data collected.

- Landor, a branding firm working for Civic Ventures, conducted an online focus group of 10 nonprofit employers June 17-19, 2008 to test branding options for the Encore Careers Campaign. Participants were screened to ensure that they had strategic decision-making power and hiring authority.
- Civic Ventures conducted a series of sounding board discussions with diverse groups of nonprofit employers: June 20 in Hartford, Connecticut; August 22 in Washington, D.C.; September 15 in Phoenix; September 17 in Dallas; September 22 in New York City; and September 24 in St. Louis. Participants were executives responsible for human resources policy and strategy at their nonprofit organizations.

Appendix B

Profile of employers surveyed

As described in Appendix A, 427 organizations were interviewed for this research. Profile information about these organizations and the individuals who responded on their behalf is below.

Organization mission

Of the 427 organizations surveyed:

- 44% are primarily focused on social services; 23% are primarily focused on health; 8% are primarily focused on education/youth; and 26% are in other sectors.*
- 52% focus on both service and advocacy; 46% focus primarily on service delivery; 2% focus on advocacy.
- 94% are classified by the Internal Revenue Service as 501(c)(3) organizations; 6% are classified as 501(c)(4) organizations.

Organization size

All organizations surveyed had at least 15 employees. Of the 427 organizations surveyed:

- 11% have 15-25 employees.
- 41% have 26-100 employees.
- 30% have 101-250 employees.
- 18% have 251 or more employees.

Of the 427 organizations surveyed,

- 12% have budgets less than \$1 million.
- 45% have budgets between \$1 and \$5 million.
- 21% have budgets of \$6 million or more.
- 22% were “not sure” about the size of their organization’s budget.

Workforce profile

The 427 organizations surveyed were asked what percentage of their workers are age 50 and older.

- 56% said less than one-quarter of employees are 50+.
- 32% said one-quarter to one-half of employees are 50+.
- 7% said one-half to three-quarters of employees are 50+.
- 1% said three-quarters to nearly all employees are 50+.
- 4% were unsure.

* Percentages may not add up to 100% due to rounding.

Interviewees

Those responding on behalf of their organizations are:

- 64% female and 36% male.**
- Of varying ages: 21% are between the ages of 18-39, 43% are between 40-54, 34% are between 55-74, and 2% did not answer.
- In one of two job categories: 58% say they are in general management positions; 38% say they are human resources professionals. Four percent said “other.”

**To ensure an accurate representation of adults nationwide, weights were applied to gender.

Appendix C

Final topline results

Tapping Encore Talent: A MetLife Foundation/Civic Ventures Survey of Nonprofit Employers

Study #8535e

Dates: March - April 2008

N = 427 nonprofit employers
 36% male
 64% female

Please note: All results are shown as percentages unless otherwise stated. Because percentages are rounded, they may not total 100%.

1a. First, are you the most senior person responsible for setting human resources policy for your company or organization? (IF "NO" OR "NOT SURE," ASK TO SPEAK WITH SOMEONE ELSE WHO IS RESPONSIBLE FOR SETTING HIRING POLICY FOR THE ORGANIZATION.)

Yes.....100

1b. And is this a nonprofit 501(c)(3) (five-oh-one-see-three) or (c)(4) (see-four) organization?

Yes, 501(c)(3) 94 CONTINUE

Yes, 501(c)(4) 6

No..... - TERMINATE

Not sure -

2. Are you in a general management or a human resources position?

General management 58

Human resources 38

Other (VOL)* 4

Not sure -

*Volunteered response

3. Does this organization focus on delivery of services, does it focus on advocacy, or does it do some of both?

Focuses on delivery of services 46

Focuses on advocacy..... 2

Does some of both..... 50

Other (VOL) 2

Not sure -

4. What is the approximate total number of U.S. employees, both full-time and part-time, currently working at your company or organization?

Fewer than 15 employees	-	TERMINATE
<hr/>		
15 to 25 employees.....	11	
26 to 100 employees.....	41	
101 to 250 employees.....	30	
251 to 500 employees.....	10	
501 to 1,000 employees.....	4	CONTINUE
1,001 to 5,000 employees.....	4	
More than 5,000 employees.....	-	
<hr/>		
Not sure	-	TERMINATE

5. Which ONE or TWO of the following is the greatest challenge your organization faces related to human resources?

THIS TABLE HAS BEEN RANKED BY THE HIGHEST PERCENTAGE

Being able to offer competitive pay and benefits.....	48
Recruiting and hiring the talent you need	42
Unwanted employee turnover.....	21
Ability to provide training and professional development opportunities	11
Employees' performance.....	9
Providing flexible schedules.....	2
Other (VOL)	1
Not sure	3

- 6a. Thinking a few years down the road, do you see the challenge of recruiting and hiring the talent you need getting easier in the future, getting harder in the future, or staying about the same for your organization?

Getting easier	9	Skip to Q.7
<hr/>		
Getting harder	45	CONTINUE
<hr/>		
Staying about the same.....	45	Skip to Q.7
Not sure	1	

(ASK ONLY OF RESPONDENTS WHO SAY "GETTING HARDER" IN Q. 6a.)

- 6b. Which ONE of the following best explains why you expect the challenge of recruiting and hiring the talent you need to get harder in the future?

THIS TABLE HAS BEEN RANKED BY THE HIGHEST PERCENTAGE

Skills shortages	31
Not enough young adults interested in nonprofit work.....	31
Tightening of the labor force	18
Retirements.....	7
Organizational growth.....	3
Other (VOL)	10
Not sure	-

7. I'm going to read you several categories of employees. Thinking about the current situation at your organization, please tell me how much of a challenge each one is for your organization to fill—not a challenge at all, a challenge to a limited extent, a challenge to a moderate extent, or a challenge to a great extent. If a particular category does not apply to your organization, please just say so.

THIS TABLE HAS BEEN RANKED BY THE PERCENTAGE WHO SAY A CHALLENGE TO A GREAT EXTENT

	A Challenge			Does Not Apply	Not Sure	
	Not At All	To A Limited Extent	To A Moderate Extent			To A Great Extent
Certified or licensed employees	16	19	33	22	10	-
Skilled employees	16	20	42	17	4	1
Providers of direct services *	16	21	39	16	7	1
Executives and senior managers *	26	24	27	15	7	1
Support staff **	34	25	26	12	2	1
Mid-level managers **	24	25	35	8	7	1

* Asked of one-half the respondents (FORM A).

** Asked of one-half the respondents (FORM B).

I'd like to ask you a few questions about some different types of individuals that your organization might employ.

8. I'm going to mention some types of individuals, and for each one, please tell me whether, in the past few years, your organization has employed that type of individual. We are not talking about unpaid volunteers, but rather individuals you employ for pay.

THIS TABLE HAS BEEN RANKED BY THE PERCENTAGE WHO SAY YES

	Yes, Organization Has Employed This Type Of Individual	No, Organization Has Not Employed This Type Of Individual	Not Sure
Younger workers who are just starting out in their careers *	95	5	-
Workers who are on part-year, part-time, or flexible schedules	88	11	1
Interns who are in college or are recent graduates **	77	21	2
Late-career workers or previously retired workers who want to work for a nonprofit organization	70	28	2

* Asked of one-half the respondents (FORM A).

** Asked of one-half the respondents (FORM B).

9. Regardless of whether you have employed them in the past, please tell me how appealing you consider each of the following categories of workers for the types of jobs you most need to fill using a scale from zero to ten, on which a ten means that it is a very appealing group, and zero means the group is not at all appealing. You may use any number from zero to ten, depending on how appealing a particular group is to you.

THIS TABLE HAS BEEN RANKED BY THE HIGHEST MEAN SCORE

	Mean	Very Appealing				Not Appealing At All	Cannot Rate
		10	8-9	5-7	0-4		
Late-career or previously retired workers willing to work for your organization for less than their previous salary	7.5	19	38	31	9	3	
Workers who are in the middle of their careers	7.3	15	39	36	8	2	
Late-career or previously retired workers Men or women who have taken time out of the workforce to care for children or other family members	7.2	15	32	42	8	3	
Late-career or previously retired workers who have made a change from work in the for-profit sector to work in the nonprofit sector	6.9	12	28	45	11	4	
Workers who are just starting out in their careers	6.8	13	26	46	14	1	
Workers who are on part-year, part-time, or flexible schedules	6.8	12	27	43	16	2	
Late-career or previously retired workers who want to do work that is entirely different from what they have been doing	6.6	10	25	47	15	3	

10a. Now I would like you to think about the category of late-career or previously retired workers who have changed the type of work they do and want to contribute toward the public good by working for an organization like yours. How appealing would you view applicants in this category for the jobs you most need to fill using a scale from zero to ten, on which a ten means very appealing, and zero means not at all appealing. You may use any number from zero to ten, depending on how appealing this category of potential employees would be to you.

10, very appealing	16
8-9	34
5-7	39
0-4, not appealing at all	10
Cannot rate	1
Mean.....	7.3

10b. And why do you say that?

(PROBE:) What do you find most appealing about this category of potential employees?

(PROBE:) What do you find least appealing about this category of potential employees?

Net Appealing Impressions	76
Knowledge, experience, skills	32
Work ethic, hard worker, dedicated, proven track record	20
Desire, passion, wanting to work, motivated	11
Dependable, reliable, more stable	10
Maturity	8
Net Unappealing Impressions	45
Won't stay long/high turn over/short-term employment/not too committed	8
Lack skills/difficulty getting trained/learning new things	5
Lack of flexibility/won't want to work long hours	4
Health issues, absenteeism due to illness	4
Workload might be too hard, too physical	4

For the rest of this survey, I want to focus on these individuals: late-career or previously retired workers who have changed the type of work they do and want to contribute toward the public good by working for an organization like yours.

11. People use different words to describe the idea of people making a change in the kind of work they do late in their career or after retirement to take a paying job for an organization like yours, helping people in their community or in the world by working for a nonprofit organization, for the government, in education, or in health care. Have you heard the term "encore career" used before to describe this kind of work, have you heard the term before but in some other context, or is this a new term to you?*

Yes, heard used to describe this kind of work 9
 Yes, heard in some other context..... 4
 No, completely new to me 86
 Not sure..... 1

*Asked of one-half the respondents (FORM A).

(READ ONLY TO FORM B.) Now let me define the phrase "people in encore careers."

(READ TO EVERYONE.)

Just to make sure we are on the same page, when I use the phrase people in encore careers, I am referring to late-career or previously retired workers who have changed the type of work they do and want to contribute toward the public good by working for an organization like yours.

12. I'm going to read you a few concerns some people have expressed about hiring people in encore careers. Thinking about the possibility of hiring people in encore careers, please tell me how much of a concern each one is for you. If an item does not apply to you, please just say so.

(FOR EACH ITEM, ASK:) The chance that they (READ ITEM). Would this be a serious concern for you, a moderate concern, or not really much of a concern?

THIS TABLE HAS BEEN RANKED BY THE PERCENTAGE WHO SAY SERIOUS OR MODERATE CONCERN

	Serious Concern	Moderate Concern	Not Really Much Of A Concern	Does Not Apply	Not Sure
Would lack necessary technical or professional skills, or their skills may not be up to date **	20	48	26	5	1
Would be reluctant to learn or adapt to new technology *	23	39	35	1	2
Would not stay in the job long *	19	43	35	3	-
Would have higher salary demands than other workers	25	34	35	5	1
Would have higher health insurance or benefit costs than other workers	19	34	38	9	-
Would need or request more flexible work arrangements than you typically provide or are comfortable with	12	37	47	4	-
Would take more sick days or other time off than other workers **	15	33	46	6	-
Would be unfamiliar and uncomfortable with nonprofit culture *	10	37	50	2	1
Would need more training than other workers	10	37	48	4	1
Would be unfamiliar with diverse work environments **	12	34	48	6	-

* Asked of one-half the respondents (FORM A).

** Asked of one-half the respondents (FORM B).

13. Thinking about total compensation including wages or salaries as well as benefits, do you expect that people in encore careers will be more expensive, less expensive, or about the same cost as other categories of potential recruits for the same job or work in your organization?*

More expensive 21
 Less expensive 11
 About the same cost 64
 Not sure 4

** Asked of one-half the respondents (FORM B).

14. I'm going to list some arrangements that you might offer employees. For each one, please tell me whether it is something your organization currently offers to all employees, currently offers to some employees, does not currently offer but would consider, or would not consider offering.

THIS TABLE HAS BEEN RANKED BY THE PERCENTAGE WHO SAY CURRENTLY OFFER TO ALL OR SOME EMPLOYEES

	Currently Offer To All Employees	Currently Offer To Some Employees	Do Not Currently Offer But Would Consider	Would Not Consider	Not Sure
Part-time work	47	43	6	3	1
Additional job training	71	18	8	3	–
Flexible schedules	45	41	7	7	–
Seasonal or part-year work	24	33	17	24	2
Tuition benefits to complete a degree or certification	26	24	22	26	2
Work related to a specific project in a specified time period	23	26	22	20	9
Flexibility regarding where work is done, such as in the employee's home or in a mobile office	10	30	21	39	–

15. I'm going to read you a few potential benefits of hiring people in encore careers. For each one I mention, please tell me how much of a benefit it would be to your organization—significant benefit, some benefit, or no benefit at all. If an item does not apply, please just say so.

THIS TABLE HAS BEEN RANKED BY THE PERCENTAGE WHO SAY SIGNIFICANT BENEFIT

	Significant Benefit	Some Benefit	No Benefit At All	Does Not Apply	Not Sure
They bring valuable experience to the job	69	27	2	1	1
At this stage of their work lives, they can bring a commitment and reliability that increase productivity and reduce staff turnover	67	28	3	1	1
They can be effective mentors for younger employees*	62	33	2	2	1
They could help fill important roles in your organization*	56	36	4	2	2
They may be a good fit for temporary, part-time, and part-year projects **	49	39	6	6	–
They help create a multigenerational workplace**	47	45	5	2	1

* Asked of one-half the respondents (FORM A).
 ** Asked of one-half the respondents (FORM B).

16. Suppose there were a no-cost program that would help your organization connect with people seeking encore careers. How interested would you be in working with such a program to help you hire and retain these individuals—very interested, fairly interested, just somewhat interested, or not that interested?

Very interested	26
Fairly interested	27
Just somewhat interested.....	32
Not that interested.....	13
Not sure	2

17. In which of the following ways could such a program be helpful to you when it comes to hiring and retaining people in encore careers?

Finding and screening them.....	48
Preparing them with training or coaching.....	25
Providing health insurance or other benefits.....	22
Providing age diversity training to all our employees	15
Designing jobs or schedules	11
Not sure	24

FACTUALS: These last few questions are for statistical purposes only.

- F1. For statistical purposes only, how old are you? (IF "REFUSED," ASK:) Well, would you tell me which age group you belong to?

18-24	1
25-29	1
30-34	9
35-39	10
40-44	12
45-49	15
50-54	16
55-59	19
60-64	9
65-69	4
70-74	2
75 and over	-
Refused.....	2

- F2. What percentage of your workforce is age fifty or over? (IF "NOT SURE," ASK:) I understand that you may not know exactly, but what is your best guess?

Less than 25% or one-quarter	56
26% to 50%, or one-quarter to one-half	32
51% to 75%, or one-half to three-quarters	7
76% to 100%, or three-quarters to nearly all employees.....	1
Not sure	4

- F3. What is the approximate annual revenue of your organization? (IF "NOT SURE", ASK:) Well, would you please just give me your best guess?

Less than \$100,000	1
\$100,000 to \$249,999	1
\$250,000 to \$499,999	2
\$500,000 to \$999,999	8
\$1 million to \$5 million	45
\$5 million to \$10 million	9
\$10 million to \$100 million	11
More than \$100 million	1
Not sure	22

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Marc Freedman
San Francisco
October 2008

“If we are not ready, this demographic wave will crash over our heads—a wasted opportunity. But if we anticipate the potential of the baby boomer generation, that wave can lift up our society and propel it forward.”

U.S. Representative John P. Sarbanes

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Available online at civicventures.org and Encore.org.

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Civic Ventures, a think tank on boomers and work, is leading the call to engage millions of baby boomers as a vital workforce for social change. Through an inventive program portfolio, original research, strategic alliances, and the power of people's own life stories, Civic Ventures demonstrates the value of experience in solving serious social problems—from education to the environment and health care to homelessness. Learn more at civicventures.org and Encore.org.



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