

# 10 STEPS FOR ENGAGING ADULTS 50+

**A GUIDE FOR YOUTH-SERVING  
ORGANIZATIONS**

*Developed by*

Encore.org's Gen2Gen campaign

*and*

The Alliance for Strong Families  
and Communities' Second Acts Initiative



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# WELCOME

As millions of children and youth in America experience severe adversity and greater social isolation than ever before, the time is ripe to tap into the growing pool of adults 50+ (what we call “encore talent”) invested in leaving the world a better place for younger generations.

Organizations and public agencies play a critical role in this vision, with the potential to engage a critical mass of older adults throughout our communities. With the help of creative, committed leaders like you, we can help create a society where older generations helping kids thrive is the norm.

This starter guide was designed by practitioners, for practitioners. It highlights ten simple steps to help kick-start the development of an intentional plan to recruit, train and retain encore talent for your organization.

Whether you’re engaging encore talent for the first time, increasing the number of experienced adults on your team, or working to further diversify your multi-generational workforce, you will find insights and ideas in this guide that will help you get beyond business as usual and prepare your organization to fully embrace people 50+.

The guide is organized into ten sections, one for each step. Each section consists of three elements:

- 1. A detailed description of the step.**
- 2. A tool or checklist to help you take action.**
- 3. Additional resources for expanding your knowledge or deepening your engagement.**

We recommend completing the Readiness Self-Assessment at the beginning of this guide to highlight which specific steps could use your attention, and utilizing the Action Plan at the end of the guide to identify priorities and next steps.



*One final note:* This guide was designed to be used in the context of a community of practitioners—sharing best practices, brainstorming how to overcome challenges, and exploring ways to customize or improve these tools for specific settings. Join the conversation at [iamgen2gen.org/champions](http://iamgen2gen.org/champions) ([bit.ly/gen2genchampions](https://bit.ly/gen2genchampions)).

We look forward to learning from your experience as we work together to connect the generations for mutual benefit.

**Welcome to the Gen2Gen community!**



**Corita Brown**  
*Leadership and Learning Director*  
Gen2Gen, powered by Encore.org



**Emily Merritt**  
*Director of Intergenerational Initiatives*  
Alliance for Strong Families and Communities



# ARE YOU READY? A SELF-ASSESSMENT

## Step 1

Create an age-inclusive environment where all generations feel engaged and respected.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on An **Age-Inclusive Environment** on page 14 and complete the action learning steps.

## Step 2

Design compelling paid and/or volunteer roles that appeal to adults 50+.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on **Role Design** on page 19 and complete the action learning steps.

## Step 3

Create position descriptions that are appealing to adults 50+.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on **Position Descriptions** on page 25 and complete the action learning steps.



## Step 4

Develop outreach messages, methods, materials and messengers that resonate with adults 50+.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on **Outreach** on page 29 and complete the action learning steps.

## Step 5

Identify appropriate and effective places, networks, online portals and events for engaging adults 50+.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on **Engagement** on page 35 and complete the action learning steps.

## Step 6

Reduce ambiguity and encourage productive communication with adults 50+ throughout the selection and hiring process.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on **Vetting & Selecting** on page 41 and complete the action learning steps.



## Step 7

Adapt onboarding and training processes to meet the needs and preferences of adults 50+.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on **Onboarding & Training** on page 46 and complete the action learning steps.

## Step 8

Provide opportunities for collaborative decision-making, personal growth and leadership to support and integrate adults 50+.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on **Integration & Support** on page 49 and complete the action learning steps.

## Step 9

Recognize and show appreciation for adults 50+; create opportunities for building social connections.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on **Recognition & Community Building** on page 52 and complete the action learning steps.



## Step 10

Modify evaluation strategies to gather data about the impact adults 50+ are having and the benefits of the work for them.

- We haven't worked on this yet.
- We've tried this a bit.
- We have substantial experience with this step.
- This is our standard organizational practice.

### TO LEARN MORE

Read the section on [Measuring Impact](#) on page 54 and complete the action learning steps.





# MAKING THE CASE FOR ENGAGING ADULTS 50+

## WHO'S IN THIS NEW TALENT POOL?

Adults 50+ are nearly one-quarter of the U.S. population and will grow to one-third by 2050.

We cover an age range of more than 30 years, come from different backgrounds and have a vast range of skills, experiences and networks. (In this guide we refer to people 50+ as “we” and “us” versus “them” because some of us are over 50 and because [insightful research from the FrameWorks Institute](#), [bit.ly/gen2genframing](http://bit.ly/gen2genframing), recommends it.)

A recent report from the Stanford Center on Longevity, *Hidden in Plain Sight: How Intergenerational Relationships Can Transform Our Future*, calls people over 50 “a vast human resource, flourishing in a world that is aging as never before, a resource waiting and ready to be tapped: millions of older adults.”

And the report warns against wasting this talent. “With a new generation of Americans reaching their 65th birthdays at the rate of over 11,000 each day, and with 32 years added to life expectancy since 1900, this is a resource that we can’t afford to ignore.”



## WHAT DO ADULTS OVER 50 WANT?

It's not easy to generalize, but as many adults 50+ reach midlife and beyond, we often begin to think about the world around us and what we can do to leave it a better place. Called "generativity," this motivation is what often draws our age group to work with children and youth, and makes us strong candidates for intergenerational and social-purpose work.



New research from a Stanford University study, *Pathways to Encore Purpose*, emphasizes the many ways that purpose is important in older adults' lives.

See <https://www.nextavenue.org/aging-purpose-underestimated/>  
([bit.ly/gen2genaging](https://bit.ly/gen2genaging))

Many adults 50+ also seek purpose, meaning and relevance. We often want to use the skills and experience we have accumulated through education, work and other experiences. We want to learn new things and connect in new ways. We may wish to take a new direction that gives us new opportunities to contribute in new ways.

By remaining active and engaged, research shows that we can add more than seven years to our lives, remaining physically, emotionally and cognitively healthy for years longer than our peers.



## HOW CAN PEOPLE OVER 50 HELP YOU?

Here are some of the benefits and rewards Adults 50+ offer to youth-serving programs.

- **BIGGER REACH.** By capitalizing on the ever-increasing numbers of older adults, you will be able to serve more children and youth in more neighborhoods.
- **TIME.** Adults 50+ who aren't working full time often have more flexibility in their schedules. We may be more available during the day and during school breaks than students or young professionals.
- **EXPERIENCE.** Older adults bring specific skills honed through decades of work, ideas from other organizations, diverse perspectives and a collaborative approach to problem solving.
- **STAYING POWER.** We are reliable and loyal. As long-standing community residents, we may have more perspective and stronger year-to-year connection to your work.
- **CONNECTIONS.** We often bring deep and diverse networks from our professional, volunteer, family and neighborhood experiences. These networks may help you recruit additional volunteers, advocate for your cause, raise funds or secure donated items.
- **ADDED CAPACITY.** We can add bench strength, take on new tasks and mentor younger talent. We can add a new dimension – intergenerational learning and collaboration – to increase your organization's effectiveness.



Although adults 50+ are not all the same, people often bundle us into the same box. This can result in assumptions about our ability to take on staff and volunteer roles in youth-serving organizations. Have you encountered any of the misconceptions listed here? Here are a few facts that might help you counter these stereotypes.

MYTHS	FACTS*
Adults 50+ are generally not interested in working/volunteering with kids or in youth-serving organizations.	A nationally representative survey of nearly 1,200 older adults aged 50-90 found that nearly half of older adults (48 percent) surveyed said they “always” or “often” try to help young people achieve their potential.
Adults 50+ slow down with age and can’t learn as quickly.	Although some brain functioning does slow down with age, overall brain efficiency improves with gains in judgment, emotional control and creativity. Adults 50+ trade off speed with an ability to manage increasing complexity.
Adults 50+ are less reliable and harder to retain in volunteer and paid roles because of ill health, vacations and other priorities.	Adults 50+ are not absent from work more than younger adults, and on average are retained longer than younger volunteers and employees. Furthermore, some new research suggests that ill health does not prevent adults 50+ from pursuing purposeful goals.
Adults 50+ do not have the physical energy necessary to run around and play with kids.	Adults 50+ can span more than three decades and will have differing levels of energy and mobility, as do younger generations. Youth-serving organizations can flourish when they provide engagement opportunities for staff and volunteers of all ages with a range of physical mobility.





### **MORE INFORMATION**

- **Hidden in Plain Sight:** How Intergenerational Relationships Can Transform Our Future. Stanford Center on Longevity. ([bit.ly/gen2genhidden](http://bit.ly/gen2genhidden))
- **I Need You, You Need Me:** The Young, The Old and What We Can Achieve Together. Generations United. ([bit.ly/gen2genneed](http://bit.ly/gen2genneed))
- **The Whys and Hows of Generations Research.** Pew Research Center. ([bit.ly/gen2genwhyhow](http://bit.ly/gen2genwhyhow))
- **Boomer Volunteer Engagement Guide** ([bit.ly/gen2genvolunteer](http://bit.ly/gen2genvolunteer))
  - Chapter 1: Understanding the World of Boomers. pages 17-22
  - Exercise: Sample Case Statement. pages 154-156
- **Encore Talent Works Toolkit.** Encore.org. ([bit.ly/gen2gentoolkit](http://bit.ly/gen2gentoolkit))
  - **About the Talent** ([bit.ly/gen2gentalent](http://bit.ly/gen2gentalent))
  - **Impact Examples** ([bit.ly/gen2genexamples](http://bit.ly/gen2genexamples))

### **\*SUPPORTING RESEARCH:**

Center for Social Development, *Experience Corps: The Volunteer Experience*, 2008

Cohen, *The Mature Mind*, 2005

Gover and McClure, *The Realities of Age Discrimination*, IEEE-USA, 2004

Velasquez, *AARP Survey on New Mexico Employers*, 2010

Stanford Center on Adolescence, *Pathways to Encore Purpose*, 2017



# STEP 1

## AN AGE-INCLUSIVE ENVIRONMENT

Creating a culture and climate in which every member of the team — regardless of age or role in the organization — feels valued, acknowledged and respected is probably the most important thing you can do to ensure success when engaging adults 50+.

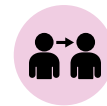
So how can you create a work environment that makes everyone feel welcome? Here are some things to pay attention to:

- Context
- Open Communication
- Learning Style
- Cross-Mentoring
- Accessibility
- Respect



### CONTEXT

Many adults 50+ want to know how their role relates to others' roles and how their work contributes to an organization's overall program or mission. Connecting everyone's role to a common outcome helps people attach value to others on the team, and seeing value can help overcome bias.



### OPEN COMMUNICATION

Honest, immediate, transparent communication can surface issues before they become problems. Communication styles, practices and vocabulary can vary with age, and understanding those differences can help people make easier adjustments. For example, some adults 50+ may prefer face-to-face conversation on critical topics instead of emails and texts.



### LEARNING STYLE

Some adults 50+ may process new information differently, wanting to relate it to a previous work or life experience. Questions may be different and more frequent than from younger adults. They may also prefer to learn in groups or on the job instead of from tutorials or books.



# STEP 1

An Age-Inclusive Environment  
*(continued)*



## CROSS-MENTORING

A multigenerational workforce enables people of different ages to learn from one another. Learning is not a one-way street from the older to the younger. Adults 50+ are often willing to share their professional networks and expertise while younger adults may share new methods and technologies.



## ACCESSIBILITY

All organizations benefit from creating environments and services that are accessible and welcoming to staff, volunteers and clients of all ages with a range of physical abilities.



## RESPECT

In a multigenerational workplace, people of all ages should feel accepted, included and valued, just as for other dimensions of workplace diversity. This involves getting to know and appreciate each individual for who they are, and checking assumptions relating to age.



# STEP 1

## An Age-Inclusive Environment

*(continued)*

## TAKING ACTION

Check which of these statements reflects your current organizational practices or ones you will adopt as part of your plan to intentionally engage adults 50+.

If you have questions about how to implement anything on this list, don't forget that you can ask questions in the [Gen2Gen Champions Group](https://bit.ly/gen2genchampions) ([bit.ly/gen2genchampions](https://bit.ly/gen2genchampions))!

### AGE-INCLUSIVE ENVIRONMENT CHECKLIST

- Context
- Open Communication
- Learning Style
- Cross-Mentoring
- Accessibility
- Respect

#### CONTEXT

- Everyone understands our intention to be welcoming to people of all ages.
- This intention is clearly expressed in our policies, values, behaviors, on-boarding, etc.
- Everyone's role is explicitly connected to a common outcome, mission or goal.
- Every position description defines responsibilities in relation to mission.
- Every worker (paid or unpaid) knows how their work relates to others on the team.

#### COMMUNICATION

- Honest, immediate and transparent communication is a clearly stated value.
- Communication styles and practices align with individual preferences (e.g., face-to-face, email, text etc.)
- Preferred communication styles are covered during our on-boarding process.
- Organizational jargon is clearly explained and generation-specific jargon is avoided.
- Intergenerational connections are encouraged to facilitate open communication.





# STEP 1

## An Age-Inclusive Environment (continued)

### LEARNING

- New information is presented in ways that align with age-specific learning styles.
- Training designed for younger adults is adapted to suit the learning style of adults 50+.
- Learning and development opportunities are available for team members of all ages.

### CROSS-MENTORING

- Opportunities exist for people of all ages to learn from one another.
- A cross-mentoring program identifies specific skills and developmental goals to guide the learning process.

### ACCESSIBILITY

- The physical work environment accommodates people of all abilities.
- Adjustments are made as needed for mobility, lighting, sound and other factors that can be anticipated for overall accessibility and as they arise for older workers.

### RESPECT

- Staff, volunteers and others on our team participate in training about topics like bridging connections across generations and cultivating empathy.
- Everyone is expected to accept, value and include others and to refrain from assumptions about abilities or interests based on age.



# STEP 1

An Age-Inclusive Environment

*(continued)*



## MORE INFORMATION

- Exercises from [Working Across Generations](http://bit.ly/gen2gengenerations) ([bit.ly/gen2gengenerations](http://bit.ly/gen2gengenerations))
  - [Personal and Generational Accomplishments and Lessons Worksheet](http://bit.ly/gen2genaccomplishments) ([bit.ly/gen2genaccomplishments](http://bit.ly/gen2genaccomplishments))
  - [Reflections on My Role and Supports Exercise](http://bit.ly/gen2genroles) ([bit.ly/gen2genroles](http://bit.ly/gen2genroles))
- [Let's End Ageism](http://bit.ly/gen2genageism). Ted Talk by Ashton Applewhite. ([bit.ly/gen2genageism](http://bit.ly/gen2genageism))
- [Boomer Volunteer Engagement Guide](http://bit.ly/gen2genvolunteer) ([bit.ly/gen2genvolunteer](http://bit.ly/gen2genvolunteer))
  - Chapter 2: Structuring for Innovation: Process & Assessment. pages 25-43
  - Exercise: Sample Needs Assessment pages 39-43



## STEP 2

# ROLE DESIGN

There are many ways the talent of adults 50+ can bring value to your organization – as volunteers or paid staff; in program/service delivery, administrative, or capacity building roles; or on an as-needed, short-term or sustained basis.

How you structure each role depends on how you define your needs, and should also reflect the way adults 50+ may want or be ready to engage. Because of time constraints, lack of confidence or questions about fit, some older adults may need an opportunity to try different roles to find the right one. For others, the commitment to an ongoing role may be immediate.

Offering a range of options can make it easier for adults 50+ to engage at different levels of commitment over time. Here is a model for thinking about a continuum of opportunities you could offer. (Model adapted from Inspired Service, Cincinnati.)



# STEP 2

Role Design  
(continued)

STAGE	DESCRIPTION	ROLE EXAMPLES	HOW TO ENGAGE
<b>STAGE 4: Champion</b>	Adults 50+ who advocate for your cause and bring new recruits to your program	Leading teams, recruiting volunteers, evaluating programs, training staff, fundraising and public speaking	Offer ways to inspire and engage others, reward these contributions
<b>STAGE 3: Committed</b>	Adults 50+ who step into sustained roles that expand and deepen your organization's mission	Tutoring, mentoring, training and on-or off-site administrative support	Recognize service, offer additional training, encourage taking on new responsibilities
<b>STAGE 2: Casual</b>	Adults 50+ who are ready to get more involved and try new ways to engage; commit to projects and short service stints with a clear goal and end date, and potentially repeat these over time	Designing web and print materials, soliciting donations and translating communications	Offer short-term, low-commitment options; ensure high satisfaction; create opportunities to deepen commitment or repeat involvement
<b>STAGE 1: Curious</b>	Aware and interested but not yet sure about commitment, willing to try something easy, may engage in activities more than once	Organizing space for afterschool activities, packing backpacks with back-to-school supplies, painting community murals, preparing school gardens and staffing special events	Provide info, stories, one-time service options; connect to others; create a clear pathway to service options with deeper levels of engagement



## STEP 2

### Role Design (continued)

#### **ADDITIONAL CONSIDERATIONS IN DESIGNING ROLES:**

- You can leverage a wider range of interests and talents if you are able to offer people several options to use their skills.
- You can leverage more people if you are able to offer both short-term and long-term opportunities.
- You can leverage additional talent if some roles can be done virtually or on a flexible schedule, allowing people who can't be on site to contribute.
- You can leverage increased commitment by offering a range of opportunities that allow adults 50+ to start small and build to higher engagement over time.

#### **OTHER DESIGN QUESTIONS TO ANSWER:**

1. Can this role be split, combined or reshaped to make it more attractive to people with limited time or needs for flexibility?
2. Can you offer incentives or stipends for certain volunteer roles, especially where you are trying to increase the diversity of your team?
3. Are internships, “mid-ternships” or other transitional roles a possibility?
4. Can you design a role that would attract a career-switcher from the private or public sector?
5. Have you considered **Encore Fellowships** ([bit.ly/gen2genfellows](http://bit.ly/gen2genfellows)) – half-time, year-long positions for adults 50+ who are shifting to the nonprofit sector or who have extensive nonprofit backgrounds and are looking for an alternate role?



# STEP 2

Role Design

*(continued)*

## TAKING ACTION

Indicate where the roles you currently have available fit on this chart. Do they fall into more than one category so that individuals have a variety of ways to engage? Can you redesign or add to these roles to make them more attractive to a broader range of adults 50+?

### CHARTING THE RANGE OF ROLES YOU OFFER

STAGE	PAID STAFF		UNPAID VOLUNTEER	
	Direct Service*	Capacity Building**	Direct Service*	Capacity Building**
<b>STAGE FOUR:</b> <b>Champion</b> <i>Advocate for your cause and bring new recruits to your program</i>				
<b>STAGE THREE:</b> <b>Committed</b> <i>Step into sustained roles that expand and deepen your organization's mission</i>				



# STEP 2

Role Design  
(continued)

<p><b>STAGE TWO:</b> <b>Casual</b> <i>Ready to get more involved and try new ways to engage; commit to projects, short service stints with a clear goal or end date, potentially repeat over time</i></p>				
<p><b>STAGE ONE:</b> <b>Curious</b> <i>Aware and interested but not yet sure about commitment; willing to try something easy, may engage in activities more than once</i></p>				

\* Direct Service = Roles working directly with children and youth

\*\* Capacity Building = Roles that help build the capacity of the organization and further its mission (administrative, strategic, etc.) but do not interact directly with young people



# STEP 2

Role Design

*(continued)*



## MORE INFORMATION

- [Boomer Volunteer Engagement Guide](http://bit.ly/gen2genvolunteer) (bit.ly/gen2genvolunteer)
  - Chapter 4: Creating the Opportunity: Position Descriptions, pages 55-66
  - Exercises: pages 148-151
- Encore Talent Works
  - [Get Started: Design](http://bit.ly/gen2gendesign) (bit.ly/gen2gendesign)





## POSITION DESCRIPTIONS

The position description does a lot of jobs, including:

- It assigns a title to a role.
- It tells the story of your organization.
- It describes how a role fits into your mission.
- It identifies the relevance of the role to the organization and its constituents.
- It specifies the responsibilities of the position.
- It defines the qualifications and skills required to perform the role.
- It identifies other requirements for the role.
- It often lays out the process for applying for the position and next steps.

A position description can also address issues that are likely to be on the minds of adults 50+ who would be a good match for the role. This is your chance to anticipate those issues and to make sure you don't leave unanswered questions that could discourage otherwise strong candidates from applying.

For example:

- Does the description state that you're interested in the life experience, the perspective and the skills of adults 50+? (You might use language like "people of all ages" or "significant life and work experience").
- Have you avoided jargon and labels such as "senior," "elderly," etc. that might not resonate with the 50+ people you are seeking to recruit? (Note: you might test the language out with a focus group of adults 50+.)
- Have you used language that might suggest you are only interested in younger or early-career candidates?



# STEP 3

## Position Descriptions (continued)



Mary Gunn, former executive director of Generations, Inc., a literacy program matching adults 50+ with children, recommends “when intentionally recruiting adults 50+ for a volunteer role with youth, it can be helpful to state this explicitly in your job description and recruiting materials or they might think they are not who the organization is looking for.”

- Is the potential impact of the position – on the life of a child, your organization’s capacity, or your community – clear?
- Does the role offer opportunities for applying specific skills or for learning and growth?
- What kinds of discretion and decision-making does the role allow or require?
- Is it clear how this role interacts with others in the organization or in the community?

Most position descriptions use boring language that makes them a challenge to read. Think about how you might brighten up your description to set it apart and make it a better reflection of your organization’s culture, people and mission. Consider these options:

- Tell a story about a success that is central to your mission.
- Use language that is simple, informal, approachable and interesting to read.
- Make an emotional as well as an intellectual pitch.
- Try to avoid jargon and technical terms, unless you intend to use the description as a screening device.
- Leave out information that doesn’t matter.
- Don’t be afraid to use images to help convey your message.
- List all the questions you think someone might want answers to and double check that the answers get included in the narrative.
- Have a few people, including adults 50+ (both familiar with the role and not), review the position description to make sure it is clear and covers what you intend.



# STEP 3

## Position Descriptions (continued)

## TAKING ACTION

Use this checklist to test whether your position descriptions include information that will appeal to the interests and preferences of adults 50+.

### POSITION DESCRIPTION CHECKLIST

#### DEMOGRAPHIC TARGET

- Use language that is relevant to adults 50+ (value of intergenerational connection, giving back, etc.).
- Highlight the value you see in life experience and skills developed over time.
- State that the role is designed for adults 50+, if relevant.

#### SOCIAL PURPOSE

- Include your organization's mission and social purpose.
- Articulate the social impact of the position.
- Include impact of the role on young people, the organization, the local community.

#### MEANINGFUL ENGAGEMENT

- Describe opportunities for connection with clients, partners, staff, peers, etc.
- Indicate specific needs, challenges or opportunities to be addressed through the role.
- Refer to the potential personal benefits of the role (motivation, connection, impact, etc.).

#### LEARNING & GROWTH

- Clearly define the job tasks and expectations.
- Outline the variety of specific skills required.
- Offer opportunities to build skills and experience.



# STEP 3

## Position Descriptions

*(continued)*

### AUTONOMY

- Include opportunity for discretion and decision-making.
- Allow for flexible work conditions (hours, location, etc.).
- Identify reporting relationships.

### CONTEXT

- Indicate how this role fits into the organization and its mission.
- Explain opportunities for collaboration (teamwork, mentoring, etc.).
- Cite ways that staff/volunteers will be supported by the culture of the organization.



### MORE INFORMATION

- [Boomer Volunteer Engagement Guide](https://bit.ly/gen2genvolunteer) (bit.ly/gen2genvolunteer)
  - Chapter 4: Creating the Opportunity: Position Descriptions. pages 55-71
  - Exercises: pages 67- 70 and 152-153
- [Encore Talent Works](https://bit.ly/gen2gentoolkit) (bit.ly/gen2gentoolkit)
  - [Tap Volunteers: Attract](https://bit.ly/gen2genattract) (bit.ly/gen2genattract)  
(includes a sample position description for skilled volunteer)
  - [Hire Encore: Attract](https://bit.ly/gen2genattract2) (bit.ly/gen2genattract2)



## OUTREACH

Outreach is the first step in the process of finding candidates to consider for your position. This process is equal parts planning, positioning, relationship-building and marketing. Here are factors to consider when planning to reach out to adults 50+.

### MESSAGES

- Appeal to the experience of adults 50+ and make clear your interest in our talent, skills, knowledge, judgment, patience, persistence, reliability or other qualities.
- Keep the tone simple, emotional and inspiring.
- Use stories to convey impact and outcomes.
- Use images, ideally of real people in real places that readers will recognize. Make sure they look like people you're trying to engage.
- Include pictures of men, who may be looking for indications that you welcome them - and that they wouldn't be the only man on the team.
- Use headlines that are short, targeted and prominent enough to grab attention.  
Example: Experience Needed. Yours!



### IDEAS FOR MESSAGE CONTENT APPEALING TO THE INTERESTS AND MOTIVATIONS OF ADULTS 50+:

Lead with the most important idea, usually about the difference this role can make in a child's life or in the community. Details about when and where are secondary.

- Adults 50+ have a lot of knowledge and experience to share with young people.
- Studies show that kids working with adults 50+ learn social skills, do better in school,
- reduce risky behaviors, and gain positive role models.

# STEP 4

## Outreach (continued)

- Adults 50+ are resilient and have coped with a lot over the years. They can use these experiences to support kids facing difficult life challenges.
- Working with kids puts adults 50+ in touch with others who share their interests, and can lead to new friendships.
- This is a meaningful way to give back and make a difference in the community.
- Many children look up to adults and respond especially well to older people.
- People who do this kind of work are generally healthier, have lower medical costs and live longer.
- It's fun! Engaged people say they are happier and more satisfied with their lives.

### MATERIALS

- Fliers still work and tear-off slips can be helpful when posting them.
- Notices on Facebook, LinkedIn, websites or elsewhere online should be tailored to those sites. Match the message to the medium and the audience.
- Keep type size at 12-point or larger to ensure readability.
- Don't put too much information into a notice. Always include links to your website, the position description and the online application, using links if the posting is online.
- Always include a clear call to action so readers will know what steps to take to apply or get more information. Test this with adults 50+ to make sure it resonates.

### MESSENGERS

- People respond best to someone they know or can identify with. Use messengers who look like those you want to engage.
- Ask messengers to tell their personal stories, listen and build relationships to inspire the interest of potential recruits.
- Consider video as a tool to get inspiring messengers in front of adults 50+ online.
- The most common reason people give for why they volunteered is this: "Someone I know asked me." Use current staff and volunteers who are 50+ (your champions) to spread the word and to follow up with or answer questions from candidates.



# STEP 4

## Outreach (continued)

- Create small incentives to thank your messengers for their efforts and to recognize recruiting successes.
- Great messengers are often people who work in local places where older adults spend time, and who are passionate about your mission.

### METHODS

- Word of mouth from a trusted source is often the most successful form of outreach.
- Post information in local businesses and public places such as grocery stores, libraries, banks or community health centers where adults 50+ are likely to be.
- Distribute flyers in neighborhood gathering places like coffee shops or farmers' markets as well as at neighborhood meetings, community information sessions, and events.
- Use your website, social media pages and other online postings to make the position visible.
- Make the posting and how to apply easy to find on your website.
- Ask other organizations to help you spread the word in their newsletters, social media pages or events.
- Consider simple ads or stories in local or community newspapers.



# STEP 4

Outreach  
(continued)

## TAKING ACTION

Use this worksheet to tailor messages, materials, messengers, and methods for the positions you're looking to fill. Note: different roles will likely require different strategies!

### OUTREACH PLANNING CHECKLIST

(Use a separate checklist for each role you are recruiting for)

#### MESSAGES

Role: \_\_\_\_\_

- Place most important idea first
- Explain opportunity to make a difference
- State explicitly why you seek adults 50+
- Include emotional appeal to impact
- Include intellectual appeal to qualifications
- Use stories that inspire
- Use simple, engaging language and tone
- Include clear call to action
- Test well with target audiences

*What messages will we test for this role?*

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#### MATERIALS

Role: \_\_\_\_\_

- Use images that target audience can relate to (consider diversity, gender, etc.)
- Grab attention through graphics, layout, color, clever headlines, etc.
- Visually relate to each other, regardless of platform (paper, online, giveaways, etc.)
- Simple, readable, visually appealing
- Include links to website, position, application
- Test well with target audiences

*What materials will we use for this role?*

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# STEP 4

Outreach  
(continued)

## MESSENGERS

Role: \_\_\_\_\_

- Look like those you want to engage
- Have local connections and knowledge
- Have compelling stories to tell
- Can speak from personal experience
- Listen well to “get” and address concerns
- Come across as authentic and genuine
- Prepared to “make the ask”
- Available on video, online, by telephone, etc. as well as in person

*Who would make a great messenger to get the word out about this role?*

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## METHODS

Role: \_\_\_\_\_

- Feature word of mouth and personal connection, the best way to engage
- Include online postings
- Include social media
- Include flyers in community gathering spots
- Include events attended by your audience
- Include partner organizations who can spread the word
- Include champions who will endorse you
- Include local papers and ads

*What methods would work best for this role?*

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# STEP 4

Outreach  
(continued)



## MORE INFORMATION

- **Boomer Volunteer Engagement Guide** ([bit.ly/gen2genvolunteer](http://bit.ly/gen2genvolunteer))
  - Chapter 5 Developing Connections: Networking and Cultivation pages 73-85
- **Encore Talent Works** ([bit.ly/gen2gentoolkit](http://bit.ly/gen2gentoolkit))
  - **Tap Volunteers: Recruit** ([bit.ly/gen2genrecruit](http://bit.ly/gen2genrecruit))
  - **Hire Encore: Recruit** ([bit.ly/gen2genrecruit2](http://bit.ly/gen2genrecruit2))



# STEP 5

## ENGAGEMENT

The prior section on outreach focuses on messengers, materials, messages, and methods. Engagement helps you develop a strategy for where to find adults 50+ and what approaches you use to reach them.

Your local senior center may seem like an obvious place to find adults 50+, but keep in mind that many senior centers are likely to serve a relatively narrow population of the older adults in your community. Many in their 50s and 60s are still working full or part time, and others may be keeping a full schedule of community and family activities.

Faith and spirituality are strong motivators for service, so faith communities and interfaith centers can be good places to recruit if you have a messenger who is already affiliated and can help with outreach. Remember, though, that many people 50+ are not formally affiliated with faith communities and would be more likely to connect with you through informal networks.

Direct referral through word-of-mouth (i.e. networking) continues to be the most effective way to find and engage adults 50+, whether in paid or unpaid roles.



# STEP 5

## Engagement (continued)

Your strategy for engagement will depend on your organization’s key priorities for the role. This table helps identify your priorities and creates a starting point for engagement activity.

Note: More than one priority and approach may apply to a single engagement effort. These may also be used in combination.

PRIORITY	WHY A PRIORITY?	APPROACH	QUESTIONS TO ASK	METHODS
Geography	Role requires being at a specific location, such as a school, where convenience and transportation are key issues.	Begin by identifying who is already linked to the location (i.e. school) and then spreads out from there.	<p>“Who comes here already?”</p> <p>“Who lives or works nearby?”</p> <p>“Who is related to the children we serve that we could engage?”</p>	Word of mouth, connections with family members, community gatherings, presentations, fliers, local newspapers, door-to-door.
Skills	Role requires specific skills or aptitudes; convenience is less important.	Begin by networking with groups including members with desired skills... with one contact leading to the next.	<p>“What groups have members with this particular skill-set who will care about our cause?”</p> <p>“Where and when can we find these groups -- in person or on line?”</p>	Word of mouth, virtual and in-person groups linked to related skills, referrals. For example, members of retired teachers’ associations might be useful for a curriculum development role.



# STEP 5

Engagement  
(continued)

<p><b>Shared Interests</b></p>	<p>Role requires shared interest or connection to a specific mission (i.e., girls in sports, racial equity, civic engagement, etc.).</p>	<p>Begin by finding individuals with shared interests through formal and informal connections (i.e. former athletes to support sports-based mentoring program.</p>	<p>“What groups might have members who would be interested in our mission?”</p> <p>“Who cares about this cause?”</p> <p>“How do we reach them?”</p>	<p>Presentations, networking events, tabling events, referral arrangements (group leader identifies potential recruits and refers them to your organization), newsletters, Facebook groups.</p>
<p><b>Culturally Specific</b></p>	<p>Role requires culturally-specific knowledge or language ability.</p>	<p>Begin with trusted community leaders (formal and informal), organizations (i.e. culturally specific organizations), and institutions (i.e. faith-based, libraries, etc.) to reach prospects.</p>	<p>“How do I build trust with local community leaders to get the word out?”</p> <p>“How can we leverage our local connections?”</p> <p>“Who works at this organization who could be a champion for us?”</p>	<p>Word of mouth, partnerships, relationship cultivation, one on one meetings, presentations, events, online postings, reciprocity (supporting organizations and events that are important to the people you want to connect with).</p>



**STEP 5**  
Engagement  
(continued)

## TAKING ACTION

To expand your engagement of adults 50+, consider a wide range of multigenerational places, networks, portals and events, as suggested in the checklist below.

### ENGAGEMENT OPTIONS CHECKLIST

#### PLACES

- Retirement communities and senior housing
- Neighborhood coffee or ice cream shops
- Barber shops, beauty parlors, nail salons, laundromats
- Gyms or fitness centers with 50+ programs
- Public libraries, community centers and organizations
- Faith organizations, interfaith centers
- Adult or community education programs (e.g. OLLI programs)
- Other: \_\_\_\_\_

#### NETWORKS OR GROUPS

- Your current donors and volunteers
- Grandparents of children you serve
- Retired professional associations (teachers, social workers, government workers, etc.)
- University alumni groups, including fraternity and sorority alums
- Social groups (book clubs, etc.)
- Neighborhood associations
- Service groups (Rotary, Lions, etc.)
- Culturally-specific organizations
- Virtual groups (e.g., on Facebook)
- Organizations serving homebound people if you're offering virtual opportunities
- Other: \_\_\_\_\_



# STEP 5

Engagement  
(continued)

## ONLINE PORTALS

- VolunteerMatch.org
- CreatetheGood.org
- CommonGoodCareers.org
- WorkforGood.org
- PointsofLight.org/HandsOnNetwork
- Idealist.org
- Nonprofit-jobs.org
- RetirementJobs.org
- LinkedIn for Nonprofits
- Nextdoor.com
- Other: \_\_\_\_\_

## EVENTS

- Farmers' markets or street fairs
- Health fairs
- Volunteer or job fairs
- Fundraisers
- Social events at your office or delivery sites
- House parties
- Community meetings
- Other: \_\_\_\_\_



# STEP 5

Engagement  
(continued)



## MORE INFORMATION

- [Boomer Volunteer Engagement Guide](http://bit.ly/gen2genvolunteer) (bit.ly/gen2genvolunteer)
  - Chapter 6: Capitalizing on Boomer Resources: Motivational Analysis pages 73-85





# STEP 6

## VETTING & SELECTING

For some 50+ adults, it may have been a long time since we have gone through a job application and interview process. Regardless of how qualified we are, our confidence and familiarity with the process may be shaky. Reducing ambiguity and encouraging communication can make the process more comfortable for adults 50+ and can also improve your chances of making a hire.

### WELCOMING

Creating an organizational climate welcoming to adults 50+ begins with the first interactions — like responding to questions, acknowledging applications, laying out the steps in the process and explaining how long it will take at each stage.

You can:

- Consider creating a checklist of requirements, indicating a timeframe for each and identifying a point of contact for questions.
- Clearly state the need for health, criminal background, and other checks; how long they take; their purpose and how they fit into the process. This may be especially critical in immigrant and other communities where sensitivity may be high about sharing personal information.
- Offer translations to prevent misunderstanding among multilingual applicants.



# STEP 6

## Vetting & Selecting (continued)

### INTERVIEWING

Interviewing adults 50+ is similar to interviewing other candidates. Behavioral interview questions are particularly useful with this age group. These questions usually begin with “Tell me about a time when...” and they ask an individual to respond with a story from their experience that relates to the point of your question.

Unlike answers to hypothetical (“If you were in a situation like this..., what would you do?”) or abstract (What do you think about a situation like this...?) questions, stories show concrete actions in specific situations. You can follow up with clarifying questions about these stories to better understand how the person is likely to react in a similar situation in your organization or with one of your clients.

Open-ended interview questions also encourage stories and avoid the possibility of dead-end Yes or No answers. If stated broadly, they can encourage adults 50+ to share non-work experiences, which may turn out to be more relevant to your decision. Here are a few examples of questions you might ask:

- (To understand motivation) Tell me the story about how you found out about this role and why it interests you.
- (To gauge empathy and compassion) Tell me about a time when you personally saw something happening that you felt was unfair. What did you do about it or what did you wish you could do?
- (To get at judgment and self-control) Please describe a time when you wanted to take an action but then thought better of it. Why did you hold back and what did you do instead?
- (To understand resourcefulness) Can you give me an example of a situation in which you had to find a creative way around an obstacle or problem?
- (To assess resilience) Describe a time when you got really stressed. How did you handle it?



# STEP 6

## Vetting & Selecting (continued)

### DETERMINING FIT

Organizational fit can be a loaded term for some who have experienced it used as an excuse for not hiring those who are different (with regard to age, race, disability status, etc.). But the concept can be helpful when based on the premise that the organization can fulfill its mission more effectively when its work and volunteer force leverage a diverse pool of perspectives, skills and experiences. Exploring organizational fit from this starting point increases the chances that employees representing a range of identities and experiences add value to your organization for a long time to come.

Before you make an offer, use these questions to guide your understanding of fit between the role, the organization and the individual:

- Are the applicant's skills aligned with the defined role and can any gaps be readily filled?
- If the applicant is coming from another sector, are their skills transferable? Can you map them to those required for this role?
- Is there a full understanding of, alignment with and commitment to your mission?
- Have you discussed your organization's values, how people interact and what might be different about your organization from their recent work or volunteer environments?
- Are expectations clear? What about flexibility, hours, training, transportation and other logistical details, compensation, supervision/reporting structure, or other features of your work environment?
- Are there additional assets the applicant has that might benefit your organization? How could you leverage them?



# STEP 6

## Vetting & Selecting (continued)

## TAKING ACTION

Ask yourself these questions in thinking about how you vet and select adults 50+ for staff and volunteer roles. If you can't answer Yes, you may need to consider making changes.

### VETTING & SELECTING CHECKLIST

#### INTAKE

- Does your website clearly state the sequence of steps in the application and review process? Is it available in print and in other languages for those who request it?
- Does it establish a timeframe for each step? Can you ensure the time frames will be met?
- Do you have communication methods in place – phone, email, text – that match the needs and preferences of your candidates?

#### VETTING

- Are all background and other checks clearly listed, along with the timeframes, costs and actions required of the applicant for each one?
- Have you developed strategies for waiving or subsidizing background check costs for lower-income applicants?
- Have you defined and communicated who will interview the applicant and when?
- Will an adult 50+ be part of the vetting and interview process?
- Does your pre-service orientation give people a good sense of what working together in the program will look and feel like?

#### SELECTING

- Is it clear how the applicant's skills, qualifications and temperament will be assessed to determine whether there is a good fit?
- Who in the organization will make the final determination?
- How will the final acceptance or rejection be communicated to the applicant? Remember, adults 50+ may prefer personal communication (via phone call) to voicemail or email messages.



# STEP 6

## Vetting & Selecting (continued)

### MATCHING

- If there is close alignment with some but not all requirements, how can the gaps be closed?
- Is there a match with the communities served in terms of language, cultural sensitivity, knowledge of the local community?
- Have team members, depending on role, had a chance to interact with the applicant?
- Have you considered how you might adapt or adjust roles to take full advantage of the talent that has come your way?

### AGREEMENT

- Have you created clear expectations, ideally in writing, about work schedule, role requirements, salary and benefits (if any), HR policies, reporting/supervision structure, etc.?
- Is there a clear understanding among staff, volunteers, partners and others about this role and upcoming work, including an opportunity for any questions or concerns to be raised?



### MORE INFORMATION

- [Coming of Age Recruitment Strategies](https://bit.ly/gen2gen50plus) (bit.ly/gen2gen50plus)
- [Boomer Volunteer Engagement Guide](https://bit.ly/gen2genvolunteer) (bit.ly/gen2genvolunteer)
  - Chapter 7: Creating the Collaboration: Interviewing & Finding the Fit. pages 97-109
- [Encore Talent Works Toolkit](https://bit.ly/gen2gentoolkit) (bit.ly/gen2gentoolkit)
  - [Tap Volunteers: Select](https://bit.ly/gen2genselect) (bit.ly/gen2genselect)
  - [Hire Encore: Select](https://bit.ly/gen2genselect2) (bit.ly/gen2genselect2)



## ONBOARDING & TRAINING

Adults 50+ walk in the door with skills, approaches, networks and a variety of personal and professional experiences we have accumulated over several decades. That may affect how you design training in a few different ways.

Training should be designed to acknowledge and leverage what new team members already know, in order to build a foundation for new skills and knowledge. Many adults 50+ learn best by associating new material to what we already know. This can mean taking time to make those connections and asking questions to clarify what we are understanding. Some adults 50+ learn best by doing rather than reading or listening, so offer opportunities for hands-on practice. We also benefit by working in groups, which allows us to compare notes and learn from each other's experience.

Adults 50+ may also be impatient to get to the heart of the matter fast. Often, we want to get directly to core skills and job-related knowledge. On the other hand, we may not want to sit through lengthy sessions. Where younger adults may be comfortable with a packed weekend of non-stop training, most adults 50+ would prefer the material spread over more than one session. This allows time for processing the information in different ways, as noted above.

It's important for adults 50+ to build camaraderie with team members. The on-boarding and training period is a good time to begin that process. Building social networks can benefit your program, encourage peers to support one another, and help keep adults 50+ healthy and feeling connected to the organization.

Retention begins on the first day.



# STEP 7

Onboarding &  
Training  
(continued)

## TAKING ACTION

This checklist will help you adapt your training materials and sessions to the needs and preferences of adults 50+.

### TRAINING CHECKLIST

#### PRE-TRAINING COMMUNICATION

- Adults 50+ know when and where training and onboarding events will be held.

#### MATERIALS

- Adults 50+ receive copies of materials and information they are expected to read before training begins.
- Materials (print and online) are printed in at least 12-point type and there is good contrast between type color and background color (lighter type is harder to read).

#### CONTENT DELIVERY AND FACILITATION

- Training is spread over several sessions rather than scheduled on a single day or weekend.
- Content relies on a mix of small-group discussions as well as direct instruction to allow for reflecting on content as it relates to previous work and life experience.
- New adults 50+ are able to meet and connect with others they will interact with in their new roles (this might include effective use of video conferencing).
- The schedule allows for frequent short breaks – about every 90 minutes.
- Online training provides robust support/tutorials on how to use the technology the role requires.

#### ACCESSIBILITY

- The program and space are suited for participants with a range of physical ability and mobility issues, including those with low vision, hearing loss, or using mobility assists like a wheelchair.
- The training room is set up in a way that respects participants' need to move around, see one another, access restrooms and shift into discussion groups.
- Adequate amplification is provided for audio in large groups or big rooms.



# STEP 7

Onboarding &  
Training

*(continued)*



## MORE INFORMATION

- **Encore Talent Works Toolkit** ([bit.ly/gen2gentoolkit](http://bit.ly/gen2gentoolkit))
  - Tap Volunteers: **Onboard** ([bit.ly/gen2genonboard](http://bit.ly/gen2genonboard)) and **Engage** ([bit.ly/gen2genengage](http://bit.ly/gen2genengage))
  - Hire Encore: **Onboard** ([bit.ly/gen2genonboard2](http://bit.ly/gen2genonboard2)) and **Engage** ([bit.ly/gen2genengage2](http://bit.ly/gen2genengage2))





## INTEGRATION & SUPPORT

How can you integrate and support adults 50+ in your organization? Many adults 50+, not unlike younger adults, seek support, but also opportunities for collaborative decision-making, personal growth and leadership in our roles as staff and volunteers.

Here are five practical tips for integrating and supporting multiple generations in your organization.

1. **ESTABLISH A COLLEGIAL RELATIONSHIP.** Understand and acknowledge strengths, interests, motivators and personal goals for growth and learning. Face-to-face communication and taking time to build rapport can facilitate this. Develop a set schedule of regular check-in meetings. These reinforce mutual respect and understanding, and they may be particularly useful when managing a much older or much younger colleague.
2. **COLLABORATE ON A WORK PLAN.** Many adults 50+ want a plan and a roadmap. We are anxious to use our skills and experience and want to get going. Developing a work plan with clear goals, deliverables and a timeline will provide the accountability you and your team members are seeking.
3. **PROVIDE OPPORTUNITIES FOR ONGOING TRAINING AND DEVELOPMENT.** Adults 50+ may be looking for ways to enhance existing skills or develop new ones. We may also be a great resource for developing the skills of other staff members or volunteers. You can support team members by offering opportunities for skill development and being open to new options. For example, some adults 50+ may be skilled managers and coaches who can help organize a team or serve as mentors within the organization.
4. **SHARE THE IMPACT.** Adults 50+ have come forward to do this work to make a difference and see the impact their time and actions can have. Make sure you continuously inspire your staff and volunteers by letting them know about the impact they're having. It'll keep them motivated.
5. **ESTABLISH FEEDBACK LOOPS.** Create opportunities for sharing ideas and feedback. This supports continuous improvement and gives everyone a voice. Whether it's through a one-to-one check-in or a staff meeting, make sure you ask and allow time for feedback and for staff and volunteers to share their opinions. Be ready to make modifications where appropriate. Be open to listening and creating a climate of mutual respect.



## STEP 8

Integration &  
Support  
(continued)

If you want to keep 50+ volunteers around for a long time, Mary Gunn, former executive director of Generations Incorporated, offers this advice: “There are three things I’d say are important. First, their experience has to be meaningful. Second, they have to feel appreciated and needed. Third, they need to have opportunities to tell you face-to-face whether their experience is a good one. Show up where they serve on a regular basis and ask them how they’re doing.”

## TAKING ACTION

Use this checklist to assess your capacity to integrate and provide meaningful support to adults 50+.

### INTEGRATION & SUPPORT CHECKLIST

#### ESTABLISH RELATIONSHIPS

- Set up regular face-to-face meetings.
- Discuss personal goals for growth and learning.
- Discuss motivators, strengths and interests.

#### COLLABORATE ON A WORK PLAN

- Establish goals.
- Create a timeline.
- Agree on deliverables.
- Hold regular meetings to review progress.

#### PROVIDE OPPORTUNITIES FOR TRAINING AND DEVELOPMENT

- Offer in-service training opportunities.
- Provide opportunities to use existing skills in different roles.
- Provide opportunities for leadership.
- Remain open to ideas that team members bring for their own skill development.



## STEP 8

Integration &  
Support  
(continued)

### SHARE THE IMPACT

- Share stories on your website, in social media and other outlets.
- Share impact in reports to staff and funders and at meetings/conferences.
- Mobilize adults 50+ as ambassadors.

### CREATE FEEDBACK LOOPS

- Offer opportunities to give and receive feedback in an open, accepting forum.
- Create a continuous improvement plan, in the spirit of lifelong learning.



### MORE INFORMATION

- [Boomer Volunteer Engagement Guide](https://bit.ly/gen2genvolunteer) (bit.ly/gen2genvolunteer)
  - Chapter 8: Nurturing the Relationship: Support. pages 111-127
  - Exercise: Individual Volunteer Plan. page 161
- [Energize Inc Website](https://bit.ly/gen2genenergize)—Retention (bit.ly/gen2genenergize)
- [What Works](https://bit.ly/gen2genwhatworks): Developing Successful Multigenerational Leadership, a report from Building Movement Project (bit.ly/gen2genwhatworks)



## RECOGNITION & COMMUNITY-BUILDING

Recognizing and appreciating adults 50+ is one of the best ways to retain us as part of a motivated, engaged and committed team. Your efforts to show how much you value our contributions will be most effective if recognition is sincere, authentic, personalized and timely.

Recognition can be as simple as a handwritten thank-you note that references a particular moment or achievement. You can also recognize contributions by offering increased decision-making power, opportunities to explore passions, share achievements or develop leadership. And you can always offer stuff, like tickets, gift cards or access to events.

It's always nice to share successes in a public way. Use your website, social media, staff meetings, even notes on bulletin boards, to create daily, weekly, monthly buzz about individual and team success. Take time to honor contributions and celebrate good outcomes!

Another important strategy for retaining adults 50+ in your organization is to provide opportunities for us to build strong social connections with other staff and volunteers. The networks and relationships that develop in the workplace are often the most valuable aspects of the work experience.

Maintaining strong social connections is critically important for adults 50+, for good mental and physical health. Nurturing new relationships can be a powerful driver for adults 50+ in pursuing work and service opportunities. Satisfied volunteers/staff are more likely to stay with your organization. By creating opportunities for multigenerational social connection, teams can come together as a community, not just a workforce.

In addition to enhancing commitment and retention, a community-building approach can benefit your organization by:

- **EXTENDING YOUR REACH.** Connections that occur within the organization can extend outside the organization and help you build new or stronger networks. This can include sharing program ideas, materials, resources – or just having fun together.
- **STRENGTHENING INTERNAL VOLUNTEER AND STAFF CONNECTIONS.** Teams can become more cohesive and productive when we get to know and appreciate one another for more than our knowledge and skill.



# STEP 9

## Recognition & Community-Building

(continued)

*Note:* Volunteer Recognition Month is April; Intergenerational Awareness Month is September. You can use these occasions to bring attention to team members and to celebrate their contributions in a broader context.

## TAKING ACTION

Identify from this checklist the steps you will take to recognize, show appreciation for and build community among your volunteers and staff, particularly adults 50+.

### RECOGNITION & COMMUNITY-BUILDING CHECKLIST

#### RECOGNIZE

- Say hello, see how they are doing and say THANK YOU!
- Put your thanks in writing with cards (or holiday cards, e.g., Grandparent's Day, Valentines).
- Put a card, Post-It, or small treat on their desk acknowledging the good work.
- Social media fans love shout outs on Facebook, Twitter, Instagram, websites.
- Invite local news coverage/media to cover special milestones/great work by staff/volunteers.
- Recognize highlights: years of service, volunteer hour attainment, special contributions.
- Tell a story about individuals' work at a team/staff meeting.
- Provide business cards and designated office/work space (especially nice for volunteers).
- Write a memo to your CEO or executive leaders about something great they did.
- Highlight individual profiles on web or in newsletters (interview them).
- Promote to new roles; increase wage/salary/stipend.

#### GIFT

- Provide T-shirts, lanyards, badges, etc. to identify with the organization.
- Provide gift cards to local restaurants, bars, book stores, etc.
- Provide tickets to concerts, plays, behind the scenes tours, etc.
- Provide reduced fees/discounted memberships to local gyms, yoga, or other services.
- Give items with your logo to use or show off, e.g., canvas bags, notebooks, mugs.



# STEP 9

## Recognition & Community-Building

(continued)

### ENGAGE

- Provide access to courses and workshops at a local college or university.
- Invite to blog on the website or in a column in your newsletter.
- Invite to speak on a radio program or other outreach gig.
- Invite to present at local/national conferences.
- Engage as co-trainers for staff on topics that use their expertise.
- Train as community ambassadors/program recruiters.
- Provide relevant professional development opportunities.

### CONNECT

- Encourage shared decision-making and collaborative problem-solving.
- Sponsor social events, like a picnic, happy hour, visit to a museum or a sporting event .
- Hold book discussions, musical recitals or an all-ages talent show.
- Organize intergenerational mentoring relationships to enable individuals to learn from one another and appreciate what each brings to the table.
- Encourage personal touches, remembering birthdays and other moments of significance.
- Ask your team members to think creatively about ways to stay connected.
- Host recognition parties/events to celebrate successes as a group.
- Create opportunities for adults 50+ to connect with other organizational staff and volunteers with whom they typically don't interact.

### MORE INFORMATION

- [Boomer Volunteer Engagement Guide](https://bit.ly/gen2genvolunteer) (bit.ly/gen2genvolunteer)
  - Chapter 9: Sustaining the Collaboration: Ongoing Engagement. pages 129-133
  - Exercise: Acknowledgement Tailored to Motivation. page 160.
- [How Volunteers Build Community Across Generations](https://bit.ly/gen2gencommunity)—Interview with Sarah McKinney (bit.ly/gen2gencommunity)



# STEP 10

## Measuring Impact

*(continued)*

## MEASURING IMPACT

You probably have an organizational measurement and evaluation plan already in place. But as you bring adults 50+ into your workplace, gathering additional data can help you understand the impact we're having and the benefits of the work for us.

Adapting your measurement and evaluation plan can help clarify:

- **What are the most effective strategies for integrating adults 50+?**
- **Is your organization benefiting from adults 50+ in the way you envisioned?**
- **How do children and youth benefit from the intergenerational relationship?**
- **How does working with younger people impact the well-being of adults 50+?**
- **Has organizational capacity been improved by engaging adults 50+? If so, how?**

Answers to questions like these can help you adapt your program delivery strategies as needed to help young people thrive, make the case for engaging more older adults, and provide critical data for fundraising efforts.



# STEP 10

## Measuring Impact

(continued)

## TAKING ACTION

This checklist will help you identify the types of data, collection methods and approaches you might consider in designing, adapting or adding to impact measures, including elements specific to adults 50+.

### MEASUREMENT AND EVALUATION CHECKLIST

#### TYPES OF DATA YOU MAY WANT TO COLLECT

- PROCESS EVALUATION.** What inputs, activities, materials, resources does it take to make the program happen? Are activities and programs being implemented the way you intended? (Sometimes called “Evaluation to Know”)
- OUTCOMES/IMPACT EVALUATION.** What are the changes you seek for the youth served? Adults 50+? Co-workers? The organization? The broader community? (Sometimes called “Evaluation to Show”)

#### THEMES YOU MAY WANT TO ASK ABOUT

- IMPACT ON YOUTH.** Do adults 50+ positively influence youth growth/success? How? What specific academic or behavioral outcomes improved? Do young people say they feel more supported?
- IMPACT ON ADULTS 50+.** Does the work benefit adults 50+? How? Do older adults report greater physical activity, feeling healthier, or more social connections?
- IMPACT ON/SATISFACTION OF CO-WORKERS.** Do co-workers see benefits from a more intergenerational team? What kind of benefits?
- INCREASE IN CAPACITY OR PROGRAM GROWTH BECAUSE OF ADULTS 50+.** Has there been an impact on the organization? What kind of impact?

#### INTAKE/ONBOARDING/EXIT DATA YOU ALREADY COLLECT

- Is there a way to adapt your current data collection to integrate themes around adults 50+? (e.g., If you don’t currently ask the age of your volunteers, you may want to add that data to examine the impact of volunteers 50+.)





# STEP 10

## Measuring Impact (continued)

### DATA COLLECTION STRATEGIES AND TOOLS TO CONSIDER

- Intake and exit forms.
- Short individual interviews.
- Focus groups/group interviews.
- Questionnaires.
- Standardized measurement tools/scales (see generativity scale in the resources section).
- Stories.

### WHO WILL DO THE WORK?

- Dedicated data/research individual or team.
- Third-party evaluation professional/firm.
- Graduate student or intern from a university program that teaches a research methods class.
- Volunteer who has retired from an evaluation or related position.
- Liaison Role: Ask someone in your organization to serve as liaison to the research team so they are oriented to what you do and get their questions answered promptly.

### DESIGN CONSIDERATIONS FOR ADULTS 50+

- 12-point font or better for all forms and measurement scales.
- Online or paper for all forms and measurement scales.
- In-person interviews and focus groups for data collection.
- Education forums to help people orient to and increase comfort around evaluations and data collection.
- Advisory teams of adults 50+ to help design and inform evaluation plan.
- Use of skilled volunteers for data collection and analysis.



# STEP 10

Measuring Impact

*(continued)*



## MORE INFORMATION

### EXAMPLES OF IMPACT

- [Volunteering as a Pathway to Productive and Social Engagement Among Older Adults.](#) Morrow-Howell, Lee, McCrary and McBride. Health Education Behavior. ([bit.ly/gen2genpathway](http://bit.ly/gen2genpathway))

### GENERATIVITY MEASUREMENT TOOL

- [Loyola Generativity Scale](#) ([bit.ly/10-Best-Practices-Loyola-Generativity](http://bit.ly/10-Best-Practices-Loyola-Generativity))



## CONCLUSION

By adapting your policies and practices to align with these ten steps, you will position your organization for success in engaging adults 50+ as part of a multigenerational workforce. The culture you create, the roles you design, the people you engage and the training and support you provide will combine to increase your capacity and position you for growth and other successful outcomes.

Bringing adults 50+ into your organization is just the first step. Taking the time to integrate them, make full use of their skills and experience, appreciate their contributions and build a supportive community can be a complex process with ups and downs, but one that has the potential to pay dividends for a long time to come. These actions – and the vitality of your mission – will help you keep this talent engaged year after year, furthering your goals, and deepening your impact on the lives of children and youth.

In addition to specific resources listed in each section, we recommend these general resources:

- [Encore Talent Works Toolkit \(bit.ly/gen2gentoolkit\)](https://bit.ly/gen2gentoolkit)
- [The Encore Impact Project: A Study of Encore Talent at Work \(bit.ly/gen2genencoreimpact\)](https://bit.ly/gen2genencoreimpact)
- [Boomer Volunteer Engagement, by Fixler, et al. \(bit.ly/gen2genvolunteer\)](https://bit.ly/gen2genvolunteer)
- [Boomer Volunteer Engagement: Facilitator's Toolkit \(bit.ly/gen2genfacilitators\)](https://bit.ly/gen2genfacilitators)
- [Working Across Generations: Defining the Future of Nonprofit Leadership 1st Edition by Frances Kunreuther, Helen Kim, Robby Rodriguez, Kim Klein \(bit.ly/gen2genworking\)](https://bit.ly/gen2genworking)

We hope you have found this guide helpful. We hope you'll join our online community at [iamgen2gen.org/champions](https://iamgen2gen.org/champions) to learn more and ask questions of other practitioners and [the Gen2Gen staff \(bit.ly/gen2genstaff\)](https://bit.ly/gen2genstaff).

As you begin making the changes needed to engage, train and support adults 50+, you can use the Action Plan on the next page as a tool for setting priorities and defining next steps.

Thank you for being on the #Gen2Gen journey!



# YOUR ACTION PLAN

Using the checklists provided in each section, take time to assess current strengths and opportunities for growth. Let these tools help you prioritize next steps. Use this chart to identify high and medium priority action steps. Be sure to note who will take responsibility for these actions and when they will be completed.

KEY STEPS	PRIORITY	ACTIONS	WHO	WHEN
<b>STEP 1.</b> Age-Inclusive Environment	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			
<b>STEP 2.</b> Role Design	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			
<b>STEP 3.</b> Position Description	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			
<b>STEP 4.</b> Outreach	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			
<b>STEP 5.</b> Engagement	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			



<b>STEP 6.</b> Vetting & Selecting	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			
<b>STEP 7.</b> On-boarding & Training	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			
<b>STEP 8.</b> Integration & Support	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			
<b>STEP 9.</b> Recognition & Community Building	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			
<b>STEP 10.</b> Measuring Impact	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low			



# ACTION WORKSHEETS APPENDIX

This section includes all of the Take Action worksheets in the guide.

STEP	WORKSHEET	PAGE
1. Age-Inclusive Environment	AGE-INCLUSIVE ENVIRONMENT CHECKLIST	
2. Role Design	CHARTING THE RANGE OF ROLES YOU OFFER	
3. Position Descriptions	POSITION DESCRIPTION CHECKLIST	
4. Outreach	OUTREACH PLANNING CHECKLIST	
5. Engagement	ENGAGEMENT OPTIONS CHECKLIST	
6. Vetting & Selecting	VETTING AND SELECTING CHECKLIST	
7. Onboarding & Training	TRAINING CHECKLIST	
8. Integration & Support	INTEGRATION AND SUPPORT CHECKLIST	
9. Recognition & Community Building	RECOGNITION AND COMMUNITY BUILDING CHECKLIST	
10. Measuring Impact	MEASURING IMPACT CHECKLIST	



# ACTION WORKSHEET

## Step 1. Age-Inclusive Environments

Check which of these statements reflects your current organizational practices or ones you will adopt as part of your plan to intentionally engage adults 50+.

If you have questions about how to implement anything on this list, don't forget that you can ask questions in the [Gen2Gen Champions Group!](https://bit.ly/gen2genchampions) ([bit.ly/gen2genchampions](https://bit.ly/gen2genchampions))

### AGE-INCLUSIVE ENVIRONMENT CHECKLIST

#### CONTEXT

- Everyone understands our intention to be welcoming to people of all ages.
- This intention is clearly expressed in our policies, values, behaviors, on-boarding, etc.
- Everyone's role is explicitly connected to a common outcome, mission or goal.
- Every position description defines responsibilities in relation to mission.
- Every worker (paid or unpaid) knows how their work relates to others on the team.

#### COMMUNICATION

- Honest, immediate and transparent communication is a clearly stated value.
- Communication styles and practices align with individual preferences (e.g., face-to-face, email, text etc.)
- Preferred communication styles are covered during our on-boarding process.
- Organizational jargon is clearly explained and generation-specific jargon is avoided.
- Intergenerational connections are encouraged to facilitate open communication.



### **LEARNING**

- New information is presented in ways that align with age-specific learning styles.
- Training designed for younger adults is adapted to suit the learning style of adults 50+.
- Learning and development opportunities are available for team members of all ages.
- Adults 50+ are recognized as developmental resources for the organization.

### **CROSS-MENTORING**

- Opportunities exist for people of all ages to learn from one another.
- A cross-mentoring program identifies specific skills and developmental goals to guide the learning process.

### **ACCESSIBILITY**

- The physical work environment accommodates people of all abilities.
- Adjustments are made as needed for mobility, lighting, sound and other factors that can be anticipated for overall accessibility and as they arise for older workers.

### **RESPECT**

- Staff, volunteers and others on our team participate in training about bridging connections across generations and cultivating empathy.
- Everyone is expected to accept, value and include others and to refrain from assumptions about abilities or interests based on age.





# ACTION WORKSHEET

## Step 2. Role Design

Indicate where the roles you currently have available fit on this chart. Do they fall into more than one category so that individuals have a variety of ways to engage? Can you redesign or add to these roles to make them more attractive to a broader range of adults 50+?

### CHARTING THE RANGE OF ROLES YOU OFFER

STAGE	PAID STAFF		UNPAID VOLUNTEER	
	Direct Service*	Capacity Building**	Direct Service*	Capacity Building**
<b>STAGE FOUR: Champion</b> <i>Advocate for your cause and bring new recruits to your program</i>				
<b>STAGE THREE: Committed</b> <i>Step into sustained roles that expand and deepen your organization's mission</i>				



<b>STAGE TWO: Casual</b> <i>Ready to get more involved and try new ways to engage; commit to projects, short service stints with a clear goal or end date, potentially repeat over time</i>				
<b>STAGE ONE: Curious</b> <i>Aware and interested but not yet sure about commitment; willing to try something easy, may engage in activities more than once</i>				

\* Direct Service = Roles working directly with children and youth

\*\* Capacity Building = Roles that help build the capacity of the organization and further its mission (administrative, strategic, etc.) but do not directly interact with young people



# ACTION WORKSHEET

## Step 3. Position Descriptions

Use this checklist to test whether your position descriptions include information that will appeal to the interests and preferences of adults 50+.

### POSITION DESCRIPTION CHECKLIST

#### DEMOGRAPHIC TARGET

- Use language that is relevant to adults 50+ (value of intergenerational connection, giving back, etc.) .
- Highlight the value you see in life experience and skills developed over time.
- State that the role is designed for adults 50+, if relevant.

#### SOCIAL PURPOSE

- Include your organization's mission and social purpose.
- Articulate the social impact of the position.
- Include impact of the role on young people, the organization, the local community.

#### MEANINGFUL ENGAGEMENT

- Describe opportunities for connection with clients, partners, staff, peers, etc.
- Indicate specific needs, challenges or opportunities to be addressed through the role.
- Refer to the potential personal benefits of the role (motivation, connection, impact, etc.).

#### LEARNING & GROWTH

- Clearly define the job tasks and expectations.
- Outline the variety of specific skills required.
- Offer opportunities to build skills and experience.



### **AUTONOMY**

- Include opportunity for discretion and decision-making.
- Allow for flexible work conditions (hours, location, etc.).
- Identify reporting relationships and how they work.

### **CONTEXT**

- Indicate how this role fits into the organization and its mission.
- Explain opportunities for collaboration (teamwork, mentoring, etc.).
- Cite ways that staff/volunteers will be supported by the culture of the organization.



# ACTION WORKSHEET

## Step 4. Outreach

Use this worksheet to tailor messages, materials, messengers, and methods for the positions you're looking to fill. Note: Different roles will likely require different strategies. Use a separate checklist for each role you are recruiting for.

### OUTREACH PLANNING CHECKLIST

#### MESSAGES

Role: \_\_\_\_\_

- Place most important idea first
- Explain opportunity to make a difference
- State explicitly why you seek adults 50+
- Include emotional appeal to impact
- Include intellectual appeal to qualifications
- Use stories that inspire
- Use simple, engaging language and tone
- Include clear call to action
- Test well with target audiences

*What messages will we test for this role?*

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#### MATERIALS

Role: \_\_\_\_\_

- Use images that target audience can relate to (consider diversity, gender, etc.)
- Grab attention through graphics, layout, color, clever headlines, etc.
- Visually relate to each other, regardless of platform (paper, online, giveaways, etc.)
- Simple, readable, visually appealing
- Include links to website, position, application
- Test well with target audiences

*What materials will we use for this role?*

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## MESSENGERS

Role: \_\_\_\_\_

- Look like those you want to engage
- Have local connections and knowledge
- Have compelling stories to tell
- Can speak from personal experience
- Listen well to “get” and address concerns
- Come across as authentic and genuine
- Prepared to “make the ask”
- Available on video, online, by telephone, etc. as well as in person

*Who would make a great messenger to get the word out about this role?*

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## METHODS

Role: \_\_\_\_\_

- Feature word of mouth and personal connection, the best way to engage
- Include online postings
- Include social media
- Include flyers in community gathering spots
- Include events attended by your audience
- Include partner organizations who can spread the word
- Include champions who will endorse you
- Include local papers and ads

*What methods would work best for this role?*

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# ACTION WORKSHEET

## Step 5. Engagement

To expand your engagement of adults 50+, consider a wide range of multigenerational places, networks, portals and events, as suggested in the checklist below.

### ENGAGEMENT OPTIONS CHECKLIST

#### PLACES

- Retirement communities and senior housing
- Neighborhood coffee or ice cream shops
- Barber shops, beauty parlors, nail salons, laundromats
- Gyms or fitness centers with 50+ programs
- Public libraries, community centers and organizations
- Faith organizations, interfaith centers
- Adult or community education programs (e.g. OLLI programs)
- Other: \_\_\_\_\_

#### NETWORKS OR GROUPS

- Your current donors and volunteers
- Grandparents of children you serve
- Retired professional associations (teachers, social workers, government workers, etc.)
- University alumni groups, including fraternity and sorority alums
- Social groups (book clubs, etc.)
- Neighborhood associations
- Service groups (Rotary, Lions, etc.)
- Culturally-specific organizations
- Virtual groups (e.g., on Facebook)
- Organizations serving homebound people if you're offering virtual opportunities
- Other: \_\_\_\_\_



### ONLINE PORTALS

- VolunteerMatch.org
- CreatetheGood.org
- CommonGoodCareers.org
- WorkforGood.org
- PointsofLight.org/HandsOnNetwork
- Idealist.org
- Nonprofit-jobs.org
- RetirementJobs.org
- LinkedIn for Nonprofits
- Nextdoor.com
- Other: \_\_\_\_\_

### EVENTS

- Farmers' markets or street fairs
- Health Fairs
- Volunteer or job fairs
- Fundraisers
- Social events at your office or delivery sites
- House parties
- Community meetings
- Other: \_\_\_\_\_





# ACTION WORKSHEET

## Step 6. Vetting and Selecting

Ask yourself these questions in thinking about how you vet and select adults 50+ for staff and volunteer roles. If you can't answer Yes, you may need to consider making changes.

### VETTING & SELECTING CHECKLIST

#### INTAKE

- Does your website clearly state the sequence of steps in the application and review process? Is it available in print and in other languages for those who request it?
- Does it establish a timeframe for each step? Can you ensure the timeframes will be met?
- Do you have communication methods in place – phone, email, text – that match the needs and preferences of your candidates?

#### VETTING

- Are all background and other checks clearly listed, along with the timeframes, costs and actions required of the applicant for each one?
- Have you developed strategies for waiving or subsidizing background check costs for lower-income applicants?
- Have you defined and communicated who will interview the applicant and when?
- Will an adult 50+ be part of the vetting and interview process?
- Does your pre-service orientation give people a good sense of what working together in the program will look and feel like?



### **SELECTING**

- Is it clear how the applicant's skills, qualifications and temperament will be assessed to determine whether there is a good fit?
- Who in the organization will make the final determination?
- How will the final acceptance or rejection be communicated to the applicant? Remember, adults 50+ may prefer personal communication (via phone call) to voicemail or email messages.

### **MATCHING**

- If there is close alignment with some but not all requirements, how can the gaps be closed?
- Is there a match with the communities served in terms of language, cultural sensitivity, knowledge of the local community?
- Have team members, depending on role, had a chance to interact with the applicant?
- Have you considered how you might adapt or adjust roles to take full advantage of the talent that has come your way?

### **AGREEMENT**

- Have you created clear expectations, ideally in writing, about work schedule, role requirements, salary and benefits (if any), HR policies, reporting/supervision structure, etc.?
- Is there a clear understanding among staff, volunteers, partners and others about this role and upcoming work, including an opportunity for any questions or concerns to be raised?



# ACTION WORKSHEET

## Step 7. Onboarding and Training

This checklist will help you adapt your training materials and sessions to the needs and preferences of adults 50+.

### TRAINING CHECKLIST

#### PRE-TRAINING COMMUNICATION

- Adults 50+ know when and where training and onboarding events will be held.

#### MATERIALS

- Adults 50+ receive copies of materials and information they are expected to read before training begins.
- Materials (print and online) are printed in at least 12-point type and there is good contrast between type color and background color (lighter type is harder to read).

#### CONTENT DELIVERY AND FACILITATION

- Training is spread over several sessions rather than scheduled on a single day or weekend.
- Content relies on a mix of small-group discussions as well as direct instruction to allow content to be discussed as it relates to previous work and life experience.

- New adults 50+ are able to meet and connect with others they will interact with in their new roles (this might include effective use of video conferencing).
- The schedule allows for frequent short breaks – about every 90 minutes.
- Online training provides robust support/tutorials on how to use the technology that is relevant to the role.

#### ACCESSIBILITY

- The program and space are suited for participants with a range of physical ability and mobility issues, including those with low vision, hearing loss, or using mobility assists like a wheelchair.
- The training room is set up in a way that respects participants' need to move around, see one another, access restrooms and shift into discussion groups.
- Adequate amplification is provided for audio in large groups or big rooms.



# ACTION WORKSHEET

## Step 8. Integration and Support

Use this checklist to assess your capacity to integrate and provide meaningful support to adults 50+.

### INTEGRATION & SUPPORT CHECKLIST

#### ESTABLISH RELATIONSHIPS

- Set up regular face-to-face meetings.
- Discuss personal goals for growth and learning.
- Discuss motivators, strengths and interests.

#### COLLABORATE ON A WORK PLAN

- Establish goals.
- Create a timeline.
- Agree on deliverables.
- Hold regular meetings to review progress.

#### PROVIDE OPPORTUNITIES FOR TRAINING AND DEVELOPMENT

- Offer in-service training opportunities.
- Provide opportunities to use existing skills in different roles.
- Provide opportunities for leadership.
- Remain open to ideas that team members bring for their own skill development.

#### SHARE THE IMPACT

- Share stories on your website, in social media and other outlets.
- Share impact in reports to staff and funders and at meetings/conferences.
- Mobilize adults 50+ as ambassadors.
- Ask for other ideas from your team.

#### CREATE FEEDBACK LOOPS

- Offer opportunities to give and receive feedback in an open, accepting forum.
- Create a continuous improvement plan, in the spirit of lifelong learning.



# ACTION WORKSHEET

## Step 9. Recognition and Community Building

Identify from this checklist the steps you will take to recognize, show appreciation for and build community among your volunteers and staff, particularly adults 50+.

### RECOGNITION & COMMUNITY-BUILDING CHECKLIST

#### RECOGNIZE

- Say hello, see how they are doing and say THANK YOU!
- Put your thanks in writing with cards (or holiday cards, e.g., Grandparent's Day, Valentines).
- Put a card, Post-It, or small treat on their desk acknowledging the good work.
- Social media fans love shout outs on Facebook, Twitter, Instagram, websites.
- Invite local news coverage/media to cover special milestones/great work by staff/volunteers.
- Recognize highlights: years of service, volunteer hour attainment, special contributions.
- Tell a story about individuals' work at a team/staff meeting.
- Provide business cards and designated office/work space (especially nice for volunteers).
- Write a memo to your CEO or executive leaders about something great they did.
- Highlight individual profiles on web or in newsletters (interview them).
- Promote to new roles; increase wage/salary/stipend.

#### GIFT

- Provide T-shirts, lanyards, badges, etc. to identify with the organization.
- Provide gift cards to local restaurants, bars, book stores, etc.
- Provide tickets to concerts, plays, behind the scenes tours, etc.
- Provide reduced fees/discounted memberships to local gyms, yoga, or other services.
- Give items with your logo to use or show off, e.g., canvas bags, notebooks, mugs.



## **ENGAGE**

- Provide access to courses and workshops at a local college or university.
- Invite to blog on the website or in a column in your newsletter.
- Invite to speak on a radio program or other outreach gig.
- Invite to present at local/national conferences.
- Engage as co-trainers for staff on topics that use their expertise.
- Train as community ambassadors/program recruiters.
- Provide relevant professional development opportunities.

## **CONNECT**

- Encourage shared decision-making and collaborative problem-solving.
- Sponsor social events, like a picnic, happy hour, visit to a museum or a sporting event.
- Hold book discussions, musical recitals or an all-ages talent show.
- Organize intergenerational mentoring relationships to enable individuals to learn from one another and appreciate what each brings to the table.
- Encourage personal touches, remembering birthdays and other moments of significance.
- Ask your team members to think creatively about ways to stay connected.
- Host recognition parties/events to celebrate successes as a group.
- Create opportunities for adults 50+ to connect with other organizational staff and volunteers with whom they typically don't interact.



# ACTION WORKSHEET

## Step 10. Measurement and Evaluation

This checklist will help you identify the types of data, collection methods and approaches you might consider in designing, adapting or adding to impact measures, including elements specific to adults 50+.

### MEASUREMENT AND EVALUATION CHECKLIST

#### TYPES OF DATA YOU MAY WANT TO COLLECT

- PROCESS EVALUATION.** What inputs, activities, materials, resources does it take to make the program happen? Are activities and programs being implemented the way you intended? (Sometimes called “Evaluation to Know”)
- OUTCOMES/IMPACT EVALUATION.** What are the changes you seek for the youth served? Adults 50+? Co-workers? The organization? The broader community? (Sometimes called “Evaluation to Show”)

#### THEMES YOU MAY WANT TO ASK ABOUT

- IMPACT ON YOUTH.** Do adults 50+ positively influence youth growth/success? How? What specific academic or behavioral outcomes improved? Do young people say they feel more supported?
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- Is there a way to adapt your current data collection to integrate themes around adults 50+? (e.g., If you don’t currently ask the age of your volunteers, you may want to add that data to examine the impact of volunteers 50+.)



### **DATA COLLECTION STRATEGIES AND TOOLS TO CONSIDER**

- Intake and exit forms.
- Short individual interviews.
- Focus groups/group interviews.
- Questionnaires.
- Standardized measurement tools/scales (see generativity scale in the resources section).
- Stories.

### **WHO WILL DO THE WORK?**

- Dedicated data/research individual or team.
- Third-party evaluation professional/firm.
- Graduate student or intern from university program that teaches a research methods class.
- Volunteer who has retired from an evaluation job.
- Liaison Role: Ask someone in your organization to serve as liaison to the research team so they are oriented to what you do and get their questions answered promptly.

### **DESIGN CONSIDERATION FOR ADULTS 50+**

- 12-point font or better for all forms and measurement scales.
- Online or paper for all forms and measurement scales.
- In-person interviews and focus groups for data collection.
- Educational forums to help people orient to and increase comfort around evaluations and data collection.
- Advisory teams of adults 50+ to help design and inform evaluation plan.
- Use of skilled volunteers for data collection and analysis.





## ACKNOWLEDGEMENTS

This guide was designed and written by a multigenerational team representing Encore.org, the Alliance for Strong Families and Communities, and Encore Boston Network. Key members of the team include Corita Brown, Ph.D., Doug Dickson, Michelle Hynes, M.Ed., Aireen Navarro Khauv, and Emily Merritt, M.S.W. Special thanks to Doug Dickson and Andrea Taylor, Ph.D. for research and writing and to additional readers including Mary Gunn, Eunice Lin Nichols, Ellie Mixter-Keller, Karimah Nonyameko and Stefanie Weiss.

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Encore.org holds the copyright for this material. We encourage you to use the materials in this guide to help others engage more older adults. We just ask that you add a line that reads, “Used with permission from Encore.org.”

### ABOUT ENCORE.ORG

[Encore.org](http://bit.ly/gen2genencore) (bit.ly/gen2genencore)– an innovation hub that taps the talent of the 50+ population as a force for good – is building a movement to engage millions of people in later life as a vital source of talent to benefit society. Encore.org’s [Gen2Gen campaign](http://bit.ly/gen2gensite) (bit.ly/gen2gensite) is working to mobilize 1 million people 50+ to help kids thrive and to build a better future for future generations.

### ABOUT THE ALLIANCE FOR STRONG FAMILIES AND COMMUNITIES

With millions of children, adults, and families across the nation experiencing barriers to achieving their full potential, the [Alliance for Strong Families and Communities](http://bit.ly/gen2genstrongfamilies) (bit.ly/gen2genstrongfamilies) works with thousands of committed social sector leaders to help their organizations more positively impact their communities. We aggregate the very best sector knowledge and serve as an incubator for learning and innovation to generate new solutions to the toughest problems. We accelerate change through dynamic leadership development and collective actions to ensure policies and systems provide equal access and opportunity for health and well-being, economic opportunity, educational success, and safety and security. Through its [Second Acts Initiative](http://bit.ly/gen2gensecondacts) (bit.ly/gen2gensecondacts), the Alliance unites a cohort of ten organizations and greater member networks around best practices and new approaches for engaging and leveraging adult 50+ talent.



## **ABOUT THE ENCORE BOSTON NETWORK**

**Encore Boston Network** ([bit.ly/gen2genboston](http://bit.ly/gen2genboston)) is a collective impact coalition of organizations and professionals dedicated to strengthening communities by engaging the talent of adults 50+ in the Greater Boston region. Through Gen2Gen Boston, we help youth-serving and other organizations build the capacity to effectively engage adults 50+ as part of a multigenerational workforce.

