

VOICES OF EXPERIENCE

Lessons for U.S. community foundations and their partners

OCTOBER 2007

community**experience**
PARTNERSHIP

engaging older adults for civic good

An initiative for U.S. community foundations from The Atlantic Philanthropies

PHASE 1 REPORT

We are looking at a different group of people who have always changed history, so their experiences are very different than older adults in the past.

—from the Good Work for Arizona project

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OVERVIEW

Prepared or taken by surprise?

Well-prepared or taken by surprise, communities nationwide are about to experience a surge in the population of adults over age 60. More than 77 million adults will enter their 60s during the next decade. They represent an extraordinary pool of social and human capital. How we respond to this demographic sea change will determine the extent to which this precious human resource is leveraged.

The Community Experience Partnership, a project of The Atlantic Philanthropies, is a collaborative effort involving 30 community foundations in communities across the United States. Over a 12-month period the partners have designed and conducted local research on programs, policies, organizations and strategies that engage older adults in addressing civic needs, as well as the barriers which prevent older adults from full, productive engagement in their communities.

Taken together, the research reveals a complex picture of older adult civic engagement. Community grantmakers and their partners planning work in the area of older adult civic engagement will want to consider these findings, understand the unique ways they manifest in our diverse communities and shape strategies accordingly.

The major findings include:

1) OLDER ADULTS ARE NOT A SINGLE HOMOGENOUS POPULATION

Older adults are not a single, homogenous population. They may share a loosely defined age bracket, but older adults otherwise have the same multitude of personal characteristics, perspectives and circumstances which present opportunities and complications for any project that is truly community-wide. What this population wants and needs is varied. The resources they are able to access are varied. The ways service providers might engage them are equally varied. It is especially important to recognize social, cultural and economic distinctions. The perceptions about civic engagement as well as the barriers and opportunities are unique among immigrants, ethnic groups and communities of color. Religion, gender, sexual orientation, educational background and economic status all dramatically affect older adults' interest in and ability to work for civic good. Generationally, older adults choose to become engaged for a variety of reasons. "Boomers"—the group just now entering their 60s—tend to have an interest in community problem-solving. They have a strong sense of their skills and want to find meaningful ways to apply their experience and get results. People in their 80s are more likely to seek social contact for companionship and look at work, lifelong learning and volunteerism as ways to maintain their physical health and mental vitality. The multiplicity of situations and motivations of older adults points to the importance of developing diverse programmatic responses that go beyond volunteerism to include paid work and opportunities for lifelong learning.

2) THE LABELS WE USE FOR OLDER ADULTS ARE PROBLEMATIC

The labels we use for older adults are problematic. Attempts to describe older adults inevitably fall short for a number of reasons. At root are mindset issues—community norms that pigeonhole older adults as needy and dependent. Terminology preferences are highly local. Terms such as "boomers," "seniors," "retirees," "experienced adults," "mature adults," and even "older adults" are welcomed or rejected in ways that reveal no clear trend. As long as there is stigma associated with aging, our terms to describe older people will carry this stigma. By generating dialogue we can provoke an exploration of these underlying prejudices. Our flexibility on language and willingness to have this discussion ultimately are central to our work on older adult civic engagement.

3) MOST OLDER ADULTS FACE PRACTICAL BARRIERS

Most older adults face practical barriers that constrain their ability to engage civically. The most significant obstacles which constrain older adults' civic engagement encompass health issues, including the need to ensure affordable insurance coverage; transportation and safety; family obligations, such as care-giving or foster parenting; and financial concerns, such as the need to supplement fixed incomes. A basic barrier for reaching older adults is a lack of information. Many older adults say they just don't know where to go to get more involved.

4) INSTITUTIONS ARE ILL-PREPARED

Most of our institutions—nonprofit organizations, public agencies and private sector businesses alike—are ill-prepared to address barriers to older adult civic engagement. Few companies or public benefit groups have made a true commitment to solving the many complex issues preventing older adults from becoming productively engaged as workers, lifelong learners and volunteers for the benefit of their communities.

The Community Experience Partnership's findings suggest that the challenge of engaging older adults for civic good is uniquely suited to community foundations, community-based grantmakers and their local partners. So much about this work—the complexities, the need for collaborative approaches, the ties to myriad other issues which impact quality of life—aligns with community foundation priorities and competencies. There is a wide range of actions, big and small, community-based grantmakers and their partners may undertake in order to advance older adult civic engagement.

There is tremendous potential. It simply needs to be released and harnessed. This work is good for older adults. It's good for our communities. We invite all who recognize the importance of older adult civic engagement to consider ways to advance the discussion in your own communities.

ABOUT THE ATLANTIC PHILANTHROPIES

The Atlantic Philanthropies is a limited-life foundation dedicated to bringing about lasting changes in the lives of disadvantaged and vulnerable people. Atlantic's grantmaking program is strategically focused to have an impact on critical social problems related to older adults, children, people with little or no access to health care, people who are being denied basic human rights and people struggling to live in peace with their neighbors. The foundation's programs cover seven regions of the world where the problems they seek to address are acute and where grantmaking can have an impact in the next 15 years: Australia, Bermuda, Northern Ireland, the Republic of Ireland, South Africa, the United States and Vietnam. Atlantic's self-imposed expiration date is in keeping with the spirit and philosophy of the founder, who personally believes in "giving while living." The goal, simply put, is to do as much good as possible, for as many disadvantaged and vulnerable people as possible, as soon as possible. Learn more at atlanticphilanthropies.org.

ABOUT COMMUNITY PLANNING & RESEARCH LLC

Community Planning & Research LLC (CPR) is a full-service evaluation, applied research and strategic planning consulting research firm chosen by The Atlantic Philanthropies to develop and manage the Community Experience Partnership. CPR is internationally respected for its work supporting community-based organizations, charitable foundations and other grantmakers, membership associations and other public benefit entities. Learn more at cprgroup.net.

Some content, research and language in this document is used courtesy of Civic Ventures, a San Francisco-based think tank and incubator working to reframe the debate on aging in America. Learn more at CivicVentures.org.

INTRODUCTION

Here comes the future

The first of 77 million baby boomers turned 60 in 2006. They are on the front edge of the largest, healthiest, best-educated population of Americans ever to move through and beyond their fifties. They are pioneers in a new stage spanning the decades between middle and late life. Neither young nor old, they represent an extraordinary pool of social and human capital.

In large numbers, they want to do work that serves a greater good. Far from frail, many of these men and women are fit, focused and looking forward to new challenges. Millions are determined to apply their experience to make a difference for others. Some are able to do so as unpaid volunteers. Others are looking to combine income and health benefits of employment with elements of service through second careers tailored to their interests and circumstances. Yet too often, the enthusiasm of this population is stymied by perceptions, policies and practices that discourage the sharing of experience. As a result, this growing number of Americans represents a largely untapped resource in a nation with many unmet needs.

Thirty U.S. community foundations have studied opportunities and barriers to civic engagement of residents over 60.

Well-prepared or taken by surprise, communities nationwide are about to experience a surge in the population of adults over 60. How we respond to this demographic sea change will determine whether this precious human resource is leveraged or squandered. Our actions will impact quality of life not just for older Americans, but for all Americans.

In this context, The Atlantic Philanthropies created a multi-year, national initiative to develop new learnings and knowledge about community-level resources and strategies for engaging older adults. Launched in 2006 as the Community Experience Partnership, the project was developed as a pool of 30 community foundations and their collaborators who, individually and together, would tackle the issue of older adult civic engagement. Over the last 12 months, the partners have designed and conducted local research on programs, policies, organizations and strategies that engage older adults in addressing civic needs, as well as the barriers which prevent older adults from full, productive engagement in their communities.

This report summarizes key findings from the Community Experience Partnership's 30 concurrent, community-driven research projects. It is not a prescription for how to address older adult needs; there exists a wide range of resources describing the challenges faced by older adults and models for how to address them.

A NOTE ON TERMINOLOGY

In this report we use the term older adults to describe the focus population of our work. This is an imperfect solution to a problem faced almost universally by the project's 30 partners. Terms such as senior citizens, experienced adults, retirees and boomers were explored. Many partners identified age brackets, a few of which began as young as 50. Although some communities voice general preferences, no term emerges as satisfactory to everyone, least of all those people being described by our labels.

Another term seen as problematic is civic engagement. Some participants developed their own working definitions of the concept, while others chose to use phrases such as community involvement. In order to be inclusive, we use civic engagement quite broadly to describe the myriad ways individuals act in support of others with whom they form a community, large or small, including not just municipal or neighborhood bonds but also neighbor-to-neighbor and familial relationships, and including paid as well as unpaid work.

This is consistent with The Atlantic Philanthropies' objective of ensuring older adults are able to actively contribute their expertise and abilities for the good of society.

If there is one overarching theme which emerges from the 30 research projects, it is that there is no single population of older adults, no single set of problems faced by an aging population, no collection of opportunities which should be pursued in all circumstances. Our premise is simply that older adults are an expanding, underutilized resource and that communities everywhere have a great deal to gain by working on this issue, each in their own way. Not every idea will blossom. Not every approach will generate traction. Some communities may wish to launch major initiatives developed from their research findings. Others may introduce modest efforts to apply their learnings. Merely by taking the time to ask the questions, though—How are older adults woven into and strengthening the fabric of our community? How does our community invite and welcome the valuable contributions of its older adults?—these 30 communities are planting seeds. The Atlantic Philanthropies and our community-based project partners are excited to share our experiences and learnings, and we invite you to consider the implications and possibilities within your own communities.

We believe this is work that is well-suited to community foundations. Indeed, the effort to engage older adults for civic good may be one of the most important aspects of work undertaken by community foundations in the coming decade. Whether through special initiatives or by adapting our ongoing community-based work to leverage the unique contributions offered by older adults, community foundations must plan for a future in which this vital, expanding segment of our population is meaningfully, productively engaged.

A COMMUNITY-BASED APPROACH

Decades from now, when social scientists and historians have the opportunity to look back at these early years of the 21st century, we will have a clearer understanding of the demographic shifts that our communities have gone through as well as the impacts of those changes. Today, we know simply that demographic change is a fact, and that many of society's existing structures must be modified in response. There is no clear remedy for the challenges we are facing. Indeed, there is no single set of challenges.

On a national basis, Americans are aging. Yet each community is experiencing its aging differently. There are common trends, but also highly unique circumstances. Not every community is actually aging. Some communities are aging organically, while others are witnessing influxes of retirees—a distinction some refer to as “from here” versus “come here.” Some areas are predominantly older on a seasonal basis. And aging is but one of many critical demographic and social trends at play in our communities. We have ethnic and immigrant groups with older members, many of whom do not speak English or have distinct cultural traditions. Economic shifts leave some regions not only older but dramatically poorer. Highly educated adults or those who have retired from skilled professions face a very different set of circumstances than those with working-class backgrounds or who worked exclusively in the home.

We shouldn't measure the generation that's coming by the forms of civic engagement that worked in the past.

— Marc Freedman, CEO, Civic Ventures

The Community Experience Partnership recognized—and indeed strove to ensure—that every participating community would look different, would bring its own set of stakeholders and would approach the project's issues uniquely. Participating communities included urban, suburban and rural from all the major regions of the country, while the community foundations themselves encompassed some of the country's oldest and largest as well as several newer and smaller organizations.

Even the most basic aspects of the work—how do we define older adults? how do we define civic engagement?—can look dramatically different depending on where the work is done. For this reason, each participant was asked to develop its own community assessment. Our expectation was not to produce a standardized and comparable data set, but a chorus of learnings that would complement and reinforce each other.

Although the overall objective was fixed—to develop broad-based community knowledge around the issue of engaging older adults—each community foundation partner set its own goals for its research, and each developed its own research methodology. As a learning community, the Partnership convened its members to exchange ideas and share solutions, but each participant was free to pursue the work in the way that was most appropriate for their populations and their research objectives. To cover the costs of the research, The Atlantic Philanthropies provided grants of up to \$25,000 to each community foundation. Several participants supplemented their grants with matching funds, which in some cases doubled or even tripled their total budgets for this year-long effort.

Many participants began by conducting a literature review, compiling key statistics about the demographics of older adults in their communities. Most developed hypotheses about the civic engagement of older adults and identified key questions they hoped to answer in order to develop a more complete picture of their situations. Some of the participants chose broad-based inquiries, looking at the overall experience of older adults; others focused on narrower dimensions, exploring a specific aspect of older adult engagement or, in some cases, looking at defined subpopulations, e.g., older adults from ethnic communities, older immigrants (non-U.S. born), adults approaching retirement age, etc.

Each community foundation developed its own research program and had the opportunity to review its plans with the Partnership's staff. Among the most rigorous projects were those that engaged consultants or worked with academic partners. Most employed a combination of standard methodologies such as surveys, focus groups and one-on-one interviews. In some cases, and in particular with ethnic communities where there were language and cultural barriers, standard research techniques had to be modified. Snowball sampling—in which an initial group of contacts identifies additional referrals, who in turn identify still more referrals—was effective in hard-to-reach communities where the community foundations had few existing relationship networks on which to draw. Focus groups in some projects were dropped in favor of community forums or interactive, problem-solving workshops. One community's web-based survey yielded results that another community obtained in church basement discussion groups.

Predictably, the form of the findings varied widely. Yet the conclusions were startlingly similar. Older adults want to be engaged—indeed, many are extremely active civically. The untapped potential, however, far exceeds our success to date. In every one of our communities, we have work to do.

RESEARCH OBJECTIVES: A SAMPLING

- Assess the capacity of our community's institutions to leverage older adults
- Create an inventory of resources and assets available to older adults who wish to be civically active
- Document how older adults are portrayed in the local media
- Document the cultural dimensions of civic engagement in order to develop strategies that tap into the traditions and civic practices in the home countries of immigrants
- Document the extent to which the 55+ population is productively engaged, whether in paid or volunteer capacities, to advance the health of our community
- Document the scope of opportunities for older adults in each of the following areas: paid and unpaid work for the good of the community; lifelong learning with a focus on building skills for a new phase of employment; and activity to advance public policies to address community concerns
- Examine perceptions of people 55 and older in relation to civic engagement in the areas of employment, volunteerism and lifelong learning
- Gather ideas for how to shift our community's paradigms about adult engagement toward one that fully embraces, engages and mobilizes older adults as community assets
- Identify culturally and geographically sensitive strategies for engaging new generations of older adults, especially those that improve on existing all-age efforts
- Identify the knowledge, know-how, experiences and skills sets our community's older adults have and match those to our existing map of community needs
- Identify the factors which either encourage or constrain older adult civic engagement
- Identify up to four community improvement initiatives which could benefit from the involvement of adults over 55 and which fall within the scope of older adults' interests
- Identify which community needs or issues would be most appropriately served by engaging older adults
- Map the local network of agencies serving older adults, and assess the ability of this network to collaborate
- Understand how older adult engagement might be different in Native American communities
- Understand how older adult engagement might be different in rural and remote-rural communities
- Understand our community's level of interest in the issue of older adult engagement, including the potential for financial support from donors
- Understand the interests and desires of individuals ages 55 to 65 concerning their future participation in the work force, community involvement and lifelong learning opportunities

KEY FINDINGS

Older adult engagement in focus

Although each of the Community Experience Partnership's 30 communities has identified challenges and opportunities that are special to local circumstances, what is most striking is the consistency of major themes that emerge across the research projects. Taken together, the research outputs reveal a complex picture of older adult civic engagement. Not every finding is borne out identically but, without exception, to a greater or lesser extent these shared learnings reflect truths that are universal. Community grantmakers and their partners planning work in the area of older adult civic engagement will want to consider these findings and understand the unique ways they manifest in our diverse communities, shaping strategies accordingly.

- 1) OLDER ADULTS ARE NOT A MONOLITHIC POPULATION**
- 2) LANGUAGE IS A COMPLICATING FACTOR**
- 3) MOST OLDER ADULTS FACE PRACTICAL BARRIERS THAT CONSTRAIN THEIR ABILITY TO ENGAGE CIVICALLY**
- 4) MOST OF OUR INSTITUTIONS ARE ILL-PREPARED TO ADDRESS THE BARRIERS TO OLDER ADULT CIVIC ENGAGEMENT**

1

OLDER ADULTS ARE NOT A MONOLITHIC POPULATION

They may share a loosely defined age bracket, but older adults otherwise have the same multitude of personal characteristics, perspectives and circumstances which present opportunities and complications for any project that is truly community-wide. What this population wants and needs is varied. The resources they are able to access are varied. And the ways service providers might engage them are equally varied.

It is especially important to recognize socio-cultural distinctions, many of which are primary to individual identity or at least more defining than an arbitrary age bracket. Civic engagement may look different from the outside and will almost certainly be experienced differently from within immigrant or ethnic communities. For some, religion and faith-based institutions are at the core of civic identity. Family structures and gender roles vary widely and impact the issue of civic engagement. Even socio-political histories (such as the shared sense of isolation or scorn felt by many older gay, lesbian, bisexual and transgendered adults) can shape the ways people engage with their wider communities.

About one-quarter of the Partnership's projects deliberately explored distinctions such as ethnicity, sexual orientation or gender. Yet even in projects where this was not an expressed research objective, these differences emerged organically: in focus groups, where men sometimes struggled to enter into a discussion about "giving to the community"; in surveys where white respondents related to the term "boomer" but Latino respondents said their experience was not reflected in this label; in informal discussions with refugees who did not recognize the help they give to sick or frail neighbors as a form of "civic engagement."

Socio-economic factors lead to major distinctions within the population of older adults. Many of the issues uncovered in the research are tied to class (which itself reflects factors such as race, ethnicity, national origin or geography). Gender differences also reflect economic realities: for some older men their sense of self-worth is tied to professional careers where status was reflected by salary. The notion of engaging with community for little or no pay is at odds with their lifelong identities—a fact that may explain why in some of the Partnership's communities women volunteers outnumber men by a factor of more than four to one.

Most critical, it is vital to distinguish so-called "younger older adults" (early retirees or those nearing retirement age; roughly age 50 to 65) from those who are over 65 and especially those who are over 75 or 80. How a community chooses to segment its population of older adults depends largely on how it understands its challenges and opportunities, and on what its objectives are in addressing the issue of civic engagement. These choices, however, drive dramatically different findings and inform correspondingly varied strategies.

"Boomers"—the group just now entering their 60s—tend to have an interest in community problem-solving. They have a strong sense of their skills and want to find meaningful ways to apply their experience and get results. In some communities they have a high interest in advocacy, social justice or other specific issue areas. This is the group most accurately captured by the Community Experience Partnership's motto, "In the 60s they changed the world. In their 60s they just may do it again."

The oldest adults studied by the Partnership—those in their 80s—have different motivations for engaging with community. They seek social contact for companionship and look at work, lifelong learning and volunteerism as ways to maintain their physical health and mental vitality. Truly a different generation than boomers, the oldest members of our communities came of age in an earlier time and have different expectations for their “golden years.” They also have more of the complications associated with advanced age and are more likely to be frail and on fixed incomes.

Our communities’ older adults are as rich in their diversity as our young people and those in middle age. Their passions and fears, their physical, intellectual and spiritual needs, their abilities and limitations are all impossible to reduce to a single set of statistics or descriptors. Ultimately, it is this diversity which makes older adults such a valuable resource, and why the goal of deepening older adult civic engagement is so promising.

MULTICULTURAL DIMENSIONS OF CIVIC ENGAGEMENT

Los Angeles-based California Community Foundation set out to learn how civic traditions from the home countries of immigrants affect their participation in the civic life of L.A. communities. Through interviews and focus groups they explored a wide range of experiences of non-U.S. born older adults, generating findings from communities with ties to Mexico, Korea, China, Hong Kong, Taiwan, Thailand, Japan, Cambodia, Tonga and the Philippines. Major findings included the prevalence of informal volunteerism (often focused on extended family or neighbors); the significance of social networks (versus institutions) as a driver of community involvement; and a major role for religious structures in transmitting social values and translating them into action. Gender differences were acute among some immigrant groups, where women’s traditional role as caregivers accentuates the distinction. The primacy of family was identified as a potential value that might be built on and expanded to develop a broader understanding of civic engagement among immigrants.

The New York Community Trust had similar findings. Their research into the unique issues of older immigrants also revealed a heightened concern with respect to being engaged in any type of “formal” activity to influence public policy.

Cultural differences are not limited to groups of differing national origin. The Baltimore Community Foundation, for example, found race, class and faith background to be strong factors influencing older Baltimoreans’ relationship to community engagement. African-American respondents tended to view their community engagement activities in terms of “community service” or as a manifestation of the tenets of their faith traditions, while white, largely affluent respondents related to the idea of “volunteerism.”

2)

LANGUAGE IS A COMPLICATING FACTOR

The labels we use for older adults are problematic: imperfect at best, and sometimes counterproductive. Attempts to describe older adults inevitably fall short for a number of reasons. For one thing, people of any age don't like to be labeled, especially by others. Even if our labels are well-intentioned, they are still labels: reductive and never wholly accurate. In the case of older adults, however, the challenge of language reflects the underlying complexities of the core issue we are trying to address. As discussed in detail above, there is no single older adult population. This heterogeneous group defies efforts at categorization. One size does not fit all.

At root are mindset issues—community norms which pigeonhole older adults as needy, dependent or valuable only in an intangible, “respect for our elders” form. “There is a perception of older people that is not real,” argues one respondent in Arizona. “It’s a national thing. This country does not value older people.” The natural starting place for some people is to think of older adults in terms of deficits, not assets. This is true not just in our communities, but in our community foundations. Because service providers tend to focus on the frail elderly—people who have mobility or health issues, or who are poor—there is a disconnect between perception and the reality of the broader population of older adults, especially baby boomers, most of whom are decades away from needing this kind of support.

Ageism is not as ubiquitous or overt as it once was; today it is more subtle, complex and hidden within our social and economic structures. And ageism is not universal. A Native American respondent from Minnesota states, “The wisdom and knowledge of elders are valued in our community.” The reality, however, is that this viewpoint is the exception. In most communities, what is needed is a paradigm shift—not just among younger people, but among older adults themselves. “I cringe when people say ‘older adults,’” explains one Michigan respondent. “Because 60 is the new 40. Things have changed. We are healthier, live longer ...”

Terminology preferences turn out to be highly local. Terms such as “boomers,” “seniors,” “retirees,” “experienced adults,” “mature adults,” and even “older adults” are welcomed or rejected in ways that reveal no clear trend. Oregon spurns “older adults” but likes “boomers.” In some Minnesota areas “boomer” was rejected. Broward County in southern Florida liked “experienced adults.” Factors such as age, race, national origin and class loomed large. There is no correct answer, and yet it is essential that communities bear language in mind as they design research, analyze findings and develop programmatic responses.

As long as there is stigma associated with aging, our terms to describe older people will carry this stigma. No sooner can we invent a neutral way of describing this population than our phrasing will lose its intended objectivity, taking on the negative connotations we hope to shed. Perhaps the best we can hope for is to generate dialogue and provoke an exploration of these underlying prejudices. Our flexibility on language and willingness to have this discussion ultimately are central to our work on older adult civic engagement.

NOT JUST SEMANTICS

Labels used to identify older adults were not the only problematic terms with which Partnership researchers struggled. The phrase “civic engagement” in most communities turned out to be perceived as vague in a way which, paradoxically, excluded many ways older adults contribute to the well-being of their families, friends and neighbors. Many respondents described feeling “left out”: a term this high-minded couldn't possibly mean caring for a sick neighbor? Being a foster parent? Contributing to the school bake sale? And what of paid work that benefits the community? Once again, the act of dialogue may be more important than the words.

3

MOST OLDER ADULTS FACE PRACTICAL BARRIERS THAT CONSTRAIN THEIR ABILITY TO ENGAGE CIVICALLY

Many Partnership communities discovered that older adults are not only civically engaged, but are among the most active participants in community-oriented work. “A clear theme that keeps coming up is people want to have a purpose in their life, they want to be doing something different,” notes Therese Ellery, Senior Program Officer at The Rose Community Foundation. At the Princeton Area Community Foundation in New Jersey, their research points to a growing population of retired or semi-retired people who want opportunities to use their skills to become change agents, problem solvers and community builders.

Yet virtually every community has large numbers of older members who are under-engaged. Many of these people face concrete obstacles. Although it may be obvious, the most significant barriers that constrain older adults’ civic engagement encompass:

- Health issues, including the need to ensure affordable insurance coverage
- Transportation and safety
- Family obligations, such as care-giving or foster parenting
- Financial concerns, such as the need to supplement fixed incomes

These issues suggest parallels to the challenges faced by women in the 1970s and 1980s as they entered the workforce in greater numbers:

- the need for flexibility in job function and in scheduling in order to balance work (paid or unpaid) with family obligations
- the need to overcome logistical barriers such as transportation or health insurance
- the perception among employers that this population is less reliable due to family obligations or health considerations
- the perception that this population is less qualified because their life experience needs to be “translated” into their new work environments
- the need for training and other programs to help integrate this population into the work environment or culture, and to offer this population opportunities for personal and professional growth

Often the most basic barrier experienced by older adults is a lack of information. Most older adults say they just don’t know where to go to get more involved. Civic engagement opportunities need to be better articulated and publicized. Even in communities where there are plentiful sources of information to connect older people with civic engagement needs, the challenge of matching volunteers or workers with appropriate opportunities remains problematic.

THE POVERTY BARRIER

Although most communities include rich and poor, the poverty rate among older adults in New York City is twice the national average, according to research compiled by the New York Community Trust. More than one in five New Yorkers over the age of 65 lives below the poverty line; older New Yorkers are half as likely as their counterparts elsewhere to own their home. For these people, financial considerations are very real. Giving their time without pay may simply not be an option.

A number of people interviewed in New York expressed concern about the emerging discourse on older adult engagement—one which emphasizes well-educated, middle-class, healthy people who “give back” during their retirement years. For some, the most pressing need is not to be connected with volunteer opportunities, but to access training that will enable them to remain in the workforce as long as possible. These older adults are willing and able to “contribute,” but will need some form of pay or stipend to survive.

4

MOST OF OUR INSTITUTIONS ARE ILL-PREPARED TO ADDRESS THE BARRIERS TO OLDER ADULT CIVIC ENGAGEMENT

Our society's decades-long experience with dramatically changing workforce demographics demonstrates that the practical challenges of engaging different populations for deeper productivity are surmountable. These are complex issues, however, requiring real commitment to finding and implementing solutions. Today, few institutions—nonprofit organizations, public agencies and private sector businesses alike—have made a true commitment to solving these complex issues. There are exceptions: small businesses that have created flexible, part-time positions for “retired” adults; national corporations that have set up “snowbird” programs allowing employees to take their jobs with them as they migrate seasonally to a warmer region. The logistical complexities, however, are myriad and not always easy to manage. Cost becomes a factor—when, for example, insurance expenses for a nonprofit organization are driven up based on the age of its part-time employees. In New York City, a municipal agency recently abandoned efforts to provide stipends to older adult workers in response to concern from unions. Payroll management is often another administrative burden, since stipends are subject to standard withholding requirements.

The issue is not exclusive to paid employment. Although nonprofit agencies arguably struggle to make effective use of volunteers of all ages, they have acute difficulty adapting their volunteer programs in order to fully leverage not just the time but the expertise of older people. Small and medium-sized organizations in particular often do not have the infrastructure capacity or depth of resources needed to effectively train and manage volunteers. Older volunteers complain of being undervalued, assigned to unskilled tasks such as answering phones or stuffing envelopes. For all kinds of work (paid and unpaid), older adults cannot simply be added into the mix. They need to be integrated through structured programs that include training, flexibility, recognition and above all meaningful and challenging work with the potential for continued learning.

At the heart of the issue is a lack of awareness about the tremendous untapped potential that is being lost through inaction. Most institutions simply have not recognized how much they stand to gain by grappling with older adult engagement in a meaningful way.

THE EDUCATED RETIREE

Maine Community Foundation's research describes a wave of in-migration of educated retirees as a “windfall of talent.” Through the 1990s, Maine followed the rural New England pattern of net out-migration of people to the South and West. Beginning in 2000, however, the trend reversed, and through 2004 the state welcomed new arrivals at a rate of more than six percent per year, many with high education levels. Today, Maine's over-65 population is 50 percent more likely than its under-65 population to have continued their education beyond four-year degrees.

Many of Maine's coming generation of retirees have the financial capacity and disposition to have long, productive retirement years. The challenge is to engage these community members. One in five Maine seniors reports being willing to boost his or her commitment to volunteering—if opportunities were more accessible and better structured for individual needs and abilities.

Half of all Americans age 50-70 want work that helps others. Many think it won't be easy to find second careers doing good work and strongly support public policy changes to remove obstacles.

— *MetLife Foundation/Civic Ventures New Face of Work Survey*

KEY LESSONS

for communities... and community foundations

One of the most important conclusions the Community Experience Partnership's findings suggest is that the challenge of engaging older adults for civic good is uniquely suited to community foundations, community-based grantmakers and their local partners.

Engaging older adults is an issue that reflects the myriad dimensions of diversity in our communities. There is no national solution, no cookie-cutter prescription that can be applied in every situation. The challenges are nuanced, as are the opportunities. Only by taking the time to understand the local situation—the unique needs of our communities, the assets offered by our older adults, their interests and passions—can we hope to capitalize on the tremendous potential which today sits unrealized. This is work that community foundations do every day. It is work that we are good at. The issues of language point to the need for dialogue and public leadership, and the barriers which must be overcome touch every aspect of community health: public policy, advocacy, education, transportation, health, etc.—again, areas where community foundations are distinguished.

There are other reasons community foundations should engage in this area. A number of Partnership participants had the important realization that many of their donors and board members are “civically engaged older adults.” This is work that donors relate to and understand firsthand, and which has the potential to ignite passions and deepen commitments. It is also work that is deeply aligned with the underlying mission of a community foundation: to harness the community's existing resources—both financial and human—for the betterment of our communities.

First, community foundations and our partners need to look inward and examine our own assumptions, policies and practices involving older adults. Are we providing meaningful ways for our community's older members to get involved, in paid and unpaid roles? Are we harnessing the knowledge and experience of the oldest among us? Engaging older adults does not necessarily need to be a special initiative. In the world we have begun to envision, this is integral to all of our community work. We may begin by devoting deliberate attention to engaging older adults, but when we are successful we will have transformed our own organizations as well as our communities.

POSSIBLE ROLES FOR COMMUNITY FOUNDATIONS

To properly tackle older adult civic engagement, an organization will need to devote significant resources over a multi-year period. As with any initiative, it is important to consider carefully not just the requirements of this effort but the ways this work will impact other efforts. The limits a community foundation confronts every day—staff capacity, language abilities, cultural competencies—are no different here. We can't take on the entire issue in all its complexities and expect complete success.

Yet there is a wide range of actions, big and small, community-based grantmakers and their partners may undertake in order to advance older adult civic engagement. They include:

COMMITMENT. Clarify internal prioritization of the issue. Identify key individual and organizational stakeholders—board members and committees, staff, donors, volunteers, grantees, grantmaking collaborators, government agencies, businesses and business groups, faith communities, other community stakeholders and the public at large. Develop their understanding of the issue and its complexities. Facilitate dialogue and build consensus on the importance of the issue and the roles that are appropriate for your organization.

ASSESSMENT. Conduct an honest internal review and look for ways to influence existing programs and resource expenditures. Recognize that civic engagement is core to everything a community-based organization does and that older adults are a critical resource to include in every initiative. Consider how and what kinds of information you gather when researching your community and how the act of collecting data shapes the engagement and buy-in of stakeholders, including older adults. Re-think and re-design training for staff and volunteers to incorporate the needs of older adults. These efforts mean more work on the front end, but over time the practices will become more manageable.

RESEARCH. Gather additional data to clarify needs and opportunities for older adult civic engagement in your community.

LEADERSHIP. Take the lead in elevating the issue and creating a communications initiative. Develop messages for key stakeholders to shift negative perceptions about older people and overcome ageism. Change attitudes toward retirement, reframing it as a time of activity and engagement. Educate and inform older adults about options. Motivate individuals and organizations to take action. Explore the issue as a potential platform for advocacy or public policy work. Remember to be inclusive of communities that may not be exposed to the most common marketing channels, e.g., immigrant communities.

INNOVATION. Find solutions to barriers identified through research, such as:

- Limited nonprofit and private sector capacity to engage older adults with paid work, volunteerism and lifelong learning opportunities
- Real-world challenges, such as transportation and insurance
- Lack of clearinghouse resources for matching older adults with opportunities; or lack of awareness about existing resources
- Linguistic and cultural barriers
- The disconnect between formal, institution-based modes of civic engagement and more informal practices common in some ethnic communities and communities of color
- The gap between older adults' skills, experiences and passions and the availability of opportunities for meaningful, fulfilling engagement.

The ideas outlined above represent just a handful of potential responses that community foundations and their partners might pursue to tackle the issue of older adult engagement head-on. Yet the opportunities are as limitless as the issues our communities face every day. Virtually any priority need of a community can be addressed by mobilizing older adults, if only we take the time to foster that mobilization by connecting community need to the interests and abilities of older adults. For example, a few Partnership communities have determined that the issue of civic engagement is more urgent for young people than for older adults. This raises the possibility that intergenerational projects might create opportunities for older adults to mentor younger people and nurture a sense of community ownership and involvement across all ages.

Across the 30 Partnership communities, one fundamental lesson has been obvious: So much about this work—the complexities, the need for collaborative approaches, the ties to myriad other issues which impact quality of life—aligns with community foundation priorities and competencies. Simply by being willing to explore the issue of older adult civic engagement, we help our communities recognize the power of a largely unseen, precious resource and we begin a dialogue with enormous potential for positive change.

PARTNERING FOR SUCCESS

Early in the initiative the Partnership's 30 community foundations recognized that close collaboration with a wide range of partners would be essential. No community-based grantmaker or provider can accomplish change by going it alone: we need contacts and relationships, credibility and trust. In particular, the projects deliberately have included but reached beyond the network of social service providers who work with the frail elderly. In many communities, a great deal of effort has been made to identify and reach out to new kinds of partners—faith-based organizations, academic institutions, business councils, the media and government. In each case, it is important to have clarity about roles and responsibilities.

Setting and communicating expectations to community-based partners is also important. Several of the 30 Partnership community foundations initially encountered concerns that their efforts to engage older adults could be in competition with social services for the frail elderly. Others have reported a surge in grant proposals and other requests for funding for this type of programming. Particularly for those grantmakers who have little prior experience in the area of senior services, outreach to community-based partners is critical but also time-consuming.

CONCLUSION

It's a new generation of opportunity

There is considerable enthusiasm around the issue of older adult civic engagement. In almost every community, people recognize the importance of exploring this issue. Older adults who participated in the research appreciated being asked. Service providers who work with older adults have been encouraged by the fresh perspectives and attention. Community foundation boards and staff have been energized by the prospect of tapping a deep well of valuable resources that could be applied toward a wide range of community needs.

In the 30 communities represented by this yearlong research effort, the impacts are already being felt. Some will conclude their work with this research, relying on others within their communities to seize the findings and act on them. Many others will develop strategies for taking their own action, both internally and in their communities. The opportunity, however, is much more vast.

Across the United States, communities are growing an immense, untapped resource: people over 60. Educated, experienced and energetic, a high percentage of these people are seeking ways to stay productive and make a difference. Nationally, the aging of the baby boom generation translates into 77 million people who are entering their 60s over the next decade. Tens of millions of boomers want to be involved in work—paid or volunteer—that helps others. They provide a workforce for civic good that exists today in nearly every community across the country.

There is tremendous potential. It simply needs to be released and harnessed. This work is good for older adults. It's good for our communities. We invite all who recognize the importance of older adult civic engagement to consider ways to advance the discussion in your own communities. We can say with confidence, the return on your investment will be richer than you can imagine.

PARTICIPANTS

ARIZONA

Arizona Community Foundation, Phoenix

CALIFORNIA

California Community Foundation, Los Angeles
Humboldt Area Foundation, Bayside
The San Francisco Foundation, San Francisco

COLORADO

Rose Community Foundation, Denver

FLORIDA

Community Foundation of Broward, Fort Lauderdale
Gulf Coast Community Foundation of Venice, Venice

ILLINOIS

The Chicago Community Trust, Chicago

INDIANA

Heritage Fund—The Community Foundation
of Bartholomew County, Columbus

KANSAS

Topeka Community Foundation, Topeka

MAINE

Maine Community Foundation, Ellsworth

MARYLAND

Baltimore Community Foundation, Baltimore
Community Foundation of the Eastern Shore, Salisbury

MASSACHUSETTS

The Cape Cod Foundation, Yarmouthport

MICHIGAN

Community Foundation for Southeast Michigan, Detroit
Grand Rapids Community Foundation, Grand Rapids
Kalamazoo Community Foundation, Kalamazoo

MINNESOTA

Northland Foundation, Duluth
Southern Minnesota Initiative Foundation, Owatonna
The Minneapolis Foundation, Minneapolis
The Saint Paul Foundation, Saint Paul

MISSISSIPPI

Foundation for the Mid South, Jackson

NEW JERSEY

Princeton Area Community Foundation, Lawrenceville

NEW MEXICO

New Mexico Community Foundation, Santa Fe

NEW YORK

New York Community Trust, New York
Rochester Area Community Foundation, Rochester

OREGON

Oregon Community Foundation, Portland

PENNSYLVANIA

Delaware County Community Foundation, Media
The Montgomery County Foundation, Inc., Norristown

TEXAS

The Dallas Foundation, Dallas

engaging
older adults for

civic

good

VOICES OF **EXPERIENCE**

Lessons for U.S. community foundations and their partners

PHASE 1 REPORT

OCTOBER 2007

community**experience**
PARTNERSHIP

engaging older adults for civic good

An initiative for U.S. community foundations from The Atlantic Philanthropies

Managed by Community Planning & Research LLC with fiduciary support from Community Initiative Funds

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