



THE BOOMER SOLUTION: **SKILLED TALENT TO MEET NONPROFIT NEEDS**

RESPECTABILITY INITIATIVE REPORT • APRIL 2010



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Finally we want to acknowledge the hard work, collective learning, knowledge sharing, and esprit de corps of the 22 community-based nonprofits that brought Models of Significant Service to life in their organizations (identified in Appendix A).



Executive Summary



With a record-setting wave of older Americans now reaching retirement age, the demand for community services is growing at an unprecedented rate. But do communities across the country have the capacity to keep up with it? In fact, they do—although they may not yet realize it. While it's true that some “young” older adults require support services, a large number remain vital, active, and socially engaged, constituting a rich pool of available talent. Many are highly skilled, and a significant percentage has managerial or professional experience. For nonprofit community-service organizations, they represent an abundant, burgeoning, and untapped resource.

The National Council on Aging (NCOA) is helping organizations use this resource to meet pressing social needs. Over the last three years, NCOA's *RespectAbility* Initiative worked with 22 nonprofit organizations around the country to foster the engagement of older adult volunteers in leadership and professional-level roles. The mandate was to develop innovative models—“Models of Significant Service” (MSS)—to engage and manage this new cadre of age 55+ volunteers. The program demonstrated the transformative, capacity-building power of these highly skilled retirees—and showed a path for all community nonprofits to provide enhanced services and achieve greater social impact.

A Huge Strategic Asset—Underappreciated, Undervalued and Underutilized

The initiative set out to demonstrate a critically important set of hypotheses about older Americans and nonprofit organizations:

- This growing population of highly educated and exceptionally experienced older adults represents a major, untapped resource that could fill leadership and professional roles in community-based nonprofit organizations.
- These volunteers could greatly augment the capacity of those organizations, enabling them to meet the increasing demands of their communities and clients.
- The volunteers' skills and talents would provide value that exceeds the investment required to engage and manage them.
- Tapping this human resource could ultimately alter the landscape of civic engagement in the United States.

In doing community service, the volunteers would also find personal meaning and satisfaction that would enrich their lives. Over the course of the two-year MSS project, NCOA has succeeded in turning these hypotheses into reality on the ground.

Building a Case

Unfortunately, not all organizations are ready to capitalize on this abundant resource. Success requires cultural, structural, behavioral, and leadership qualities that support organizational change and innovation. But too many nonprofit leaders focus on scarcity and fail to see the potential bounty in front of them.

The Respect*Ability* Initiative set out to convince these leaders by building a strong case for utilizing highly skilled older adults in leadership-level volunteer roles. To test the hypothesis that the value of the services such volunteers provide would surpass the cost of recruiting and managing them, NCOA developed an online benchmarking and return-on-investment-calculating tool. The 22 MSS sites used the tool over the course of their projects, and an equal number of non-MSS community-based organizations were also recruited to participate in piloting the ROI tool—Strategic Metrics and Results Tracking (SMART).

Is It Worth the Effort?

The answer to this question is a resounding “yes.” While it takes investment on the part of nonprofits to attract, engage, and manage leadership-level volunteers, the experience of over 40 NPOs around the country (MSS demonstration sites and others) shows that the return on that investment is strikingly impressive. Participating organizations achieved an average return-on-investment of nearly 800 percent.

Building on lessons learned over the course of the MSS initiative, NCOA is prepared to share techniques and tools that can jump-start nonprofits’ efforts to build

capacity and better serve their communities. These resources will help align nonprofit organizational needs with the expectations of potential Boomer volunteers and help NPOs fully leverage the extraordinary talents these volunteers possess.

This Report

This report outlines how best to leverage the talents of skilled older adults and what is gained in return:

- Organizational practices that proved to maximize the impact of adult 55+ volunteers
- Higher-level volunteer roles and their added value
- NCOA’s return-on-investment (ROI) approach to assessing unpaid work and characterizing organizations that realize success
- Overviews of the 22 participating MSS sites’ individual models
- Fundamental principles from past NCOA research
- Proven successful techniques, ranging from team structures, to participatory evaluation, to social networked knowledge sharing

These findings are the first in a stream of materials intended to advance older adult civic engagement and help ensure that communities throughout the country benefit from the abundant resource that adults 55+ represent.



Making the Case for Engaging Older Adult Volunteers in Leadership Roles

Introduction

In the face of long-standing resistance from nonprofit leaders to utilizing older adult volunteers in higher-level, more demanding roles, NCOA's Respect*Ability* Initiative set out to test the hypothesis that there is, in fact, a compelling case for them to do so. From the outset, the questions have been:

- Can 55+ adults in professional-and leadership-level volunteer roles contribute significantly to increasing the capacity of nonprofit organizations?
- Does the value these volunteers add to their organizations justify the investment of time and money required to engage and manage them effectively?
- Do any existing standard measures offer the ability to gauge return-on-investment and establish benchmarks of effectiveness?

NCOA developed the online SMART tool (Strategic Metrics and Results Tracking) to help resolve these issues. Using Bureau of Labor Statistics marketplace wage data for various jobs, comprehensive organization-entered cost data, and volunteer management information, SMART provides return-on-investment (ROI) and benchmarking insights related to making the most of the skills Boomers (broadly defined) have to offer.

As a group, the participants in the SMART pilot have shown that leadership volunteers age 55+ can play a variety of critical roles in increasing the capacity and impact of their organizations. The data also demonstrate that the value produced by those volunteers far exceeds the investment required to engage them, and that we can measure that value using recognized marketplace data.

This summary provides a brief overview and analysis of SMART response patterns based on the data submissions of the pilot group, which comprised community-based nonprofit organizations participating in the Respect-*Ability* project from January 2008 to March 2009.

Overview of pilot participants

Forty-four organizations from locations across the country participated in the SMART pilot—12 Wave One Model of Significant Service sites, 10 Maricopa County Arizona Wave Two MSS sites, and 22 organizations not involved in the Models of Significant Service initiative. Pilot participant characteristics and service/volunteer data include the following:

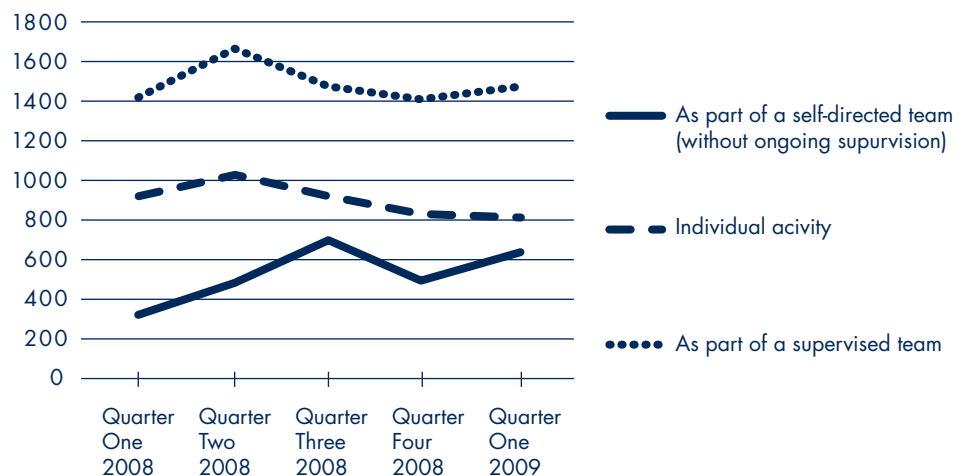
Characteristics of—and Volunteer Activity/Service in—Pilot Organizations	Quarterly Average Per Site Over the Course of the Pilot
Clients served	Nearly 16,000
Volunteers engaged	Over 550
Adult 55+ volunteers engaged	385
Professional/leadership-level roles filled by adult 55+ volunteers	67
Hours of service by 55+ professional/leadership-level volunteers	Nearly 2,000

Structure of service

Pilot sites predominantly engaged adult 55+ professional-and leadership-level volunteers as part of supervised teams. Others were left to work individually. A third option, the self-directed team structure, was the least utilized form of organizing leadership volunteers, but it showed the most growth over the course of the pilot study. The number of leadership volunteers within each structure changed as follows:

As part of a self-directed team	96% increase
Individual activity (not part of an ongoing team)	11% decrease
As part of a supervised team	4% increase

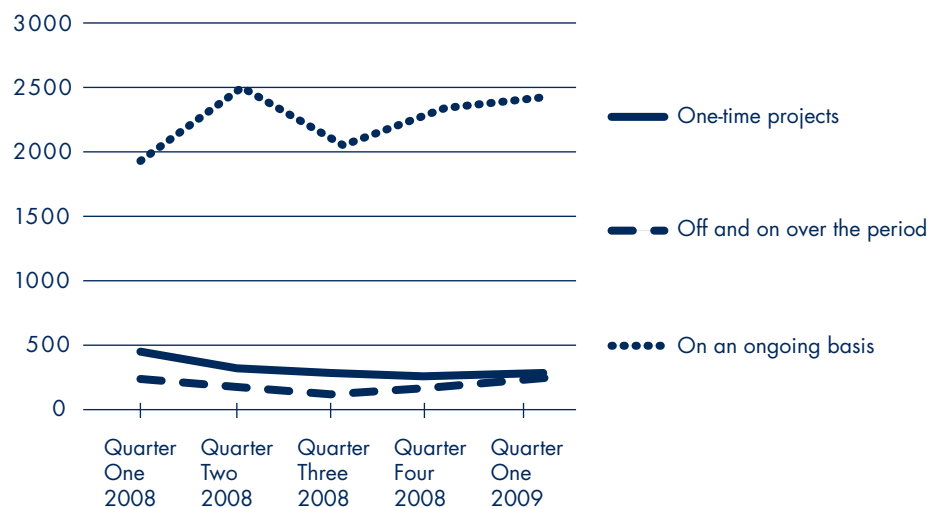
Quarters 1-4 2008, Quarter 1, 2009 Volunteer Service Structure



Term of Service

When reporting the term of service of their leadership volunteers, pilot participants overwhelmingly characterized it as “working on an ongoing basis.” Once immersed in meaningful work for an organization, our target group of 55+ leadership volunteers tended to work on a continuing basis. This contradicts the popular misconception that Boomer volunteers are difficult to retain. If they have meaningful work to do, they continue to serve.

Quarters 1-4 2008, Quarter 1, 2009 Terms of Service



Return on Investment

While there was variation across the 44 sites participating in the SMART pilot, the overall pattern provides strong confirmation of the hypothesis with which NCOA entered this initiative. There is, indeed, a strong case for utilizing 55+ adults in leadership roles and for investing in their skills and experience to increase the capacity of nonprofit organizations.

PILOT ORGANIZATIONS ROI¹ PERFORMANCE

Total Pilot – Average (Mean) ROI:	792 %
Total Pilot – Median ROI:	248 %
MSS Wave 1 – Average ROI:	355 %
MSS Wave 2 – Average ROI:	792 %
Non-MSS – Average ROI:	1029 %

¹ ROI percentage is calculated by taking the total value of professional/ leadership-level volunteers' work minus the cost incurred in gaining that value, then dividing this number by the total cost used above, and multiplying by 100.

The higher average ROI achieved by non-MSS sites is not surprising. These organizations had been using older adult volunteers in leadership roles before the beginning of the Models of Significant Service initiative and the SMART pilot. MSS sites were launching new programs directly related to organizational capacity building. Accordingly, they faced start-up costs, and some had not yet reached the break-even or positive ROI points until later in their evolution.

Factors Affecting Return-on-investment

Self-Directed Teams. Nearly 70 percent of volunteers worked as part of a team, with self-directed teams appearing to be a differentiator in determining ROI. Pilot organizations with the highest ROI percentages utilized self-directed teams to a far greater extent than those with the lowest. In fact, nearly three times as many of their leadership volunteers were organized this way: 29 percent among top performing organizations; 10 percent among worst performing organizations. Sites that organized their leadership volunteers into self-directed teams both satisfied the desire of those volunteers for greater autonomy and reduced the cost of their efforts by reducing the time staff invested.

Volunteer Empowerment and Fully Leveraging Volunteer Talents. Beyond self-directed teams, the general degree to which pilot organizations empower their 55+ professional volunteers has a discernable impact on the value that those volunteers add. Consistent with what other research tells us about Boomers' preferences and motivations in a professional volunteer opportunity, organizations that give their volunteers higher levels of autonomy and responsibility generally achieve higher returns on their investment.

In the section of the SMART tool that asks respondents to indicate the degree to which certain volunteer engagement and management practices have affected their outcomes, several differences became apparent in the responses of organizations with the highest ROI percentages and those with the lowest. Along the five-point continuum of choices (where 1 is "not done" and 5 is "most important"), sites with the highest ROI rated specific practices at least .5 points higher than sites with lowest ROI. These practices include:

- Using current volunteers to orient new volunteers to the organization and to the nonprofit world
- Using current volunteers to train and coach new volunteers with respect to specific assignments
- Training volunteers to be advocates in the community

- Enabling volunteers to develop their own plans for completing work
- Seeking volunteer input in program development
- Using volunteer talent to supplement staff capabilities

Nature of Volunteer Roles Created. While the leadership/professional roles pilot participants created for adult 55+ volunteers varied widely, certain types of roles appear in greater numbers among higher-ROI sites, for example:

- Top performing organizations engaged nearly six times as many 55+ volunteers in senior executive roles.
- Combined, higher-ROI sites engaged a quarterly average of over 100 adults, age 55+, in volunteer coordinator roles; the worst performing sites engaged none in this role.
- Top performing organizations engaged a significant number of volunteers in project leader/manager and fundraiser roles; the worst performing organizations listed none in this role.
- The higher performing sites also used many more of their volunteers in accounting roles.

Number of 55+ Adults in Professional/Leadership-Level Roles.

Organizations with the highest ROIs engaged 50 percent more leadership volunteers than those with the lowest—irrespective of organizational size. In fact, on average, organizations with the lowest ROIs were far larger (with seven times the number of clients as those at the top).

Other Practices that Seemed to Make a Difference

- **Targeted Recruiting.** Organizations with the highest ROIs tended to reach out purposefully to professional/leadership-level volunteers. They rated “developing recruiting messages specifically to reach professional/leadership-level volunteers” as being considerably more important than did those organizations with the worst ROI performances.
- **Monitoring and Fulfilling Expectations.** High-performing organizations found other ways to increase volunteer satisfaction. They rated “assessing how well volunteer experience fulfills expectations” higher than did lower ROI organizations.

- **Volunteer Recognition.** Top performing organizations rated “designing recognition programs for volunteers” as being much more important than did those organizations that showed the lowest ROIs.
- **To Stipend or Not.** On average, top performing organizations gave “provided stipends” their lowest ratings. While organizations with the worst ROIs also rated this practice low, they rated it as more important than did those organizations with the highest ROI percentages.

Best Practices: What It Takes to Capitalize on the Asset of Aging



It almost seems like a syllogism. But somehow it doesn't work out that way.

- Community-based nonprofits have enormous capacity-building needs and a scarcity of resources.
- There is a growing cohort of 55+ adults with leadership and professional talent, willing and able to give back to their communities.
- Ergo: A match made in heaven?
- Not quite.
- Why are the two not coming together more often?

The organizations that participated in NCOA's MSS initiative demonstrated what is needed in the trenches. First is a clear realization that the rules of the game have changed. New cohorts of adults turning 60 and 65 are different. Nonprofit leaders' needs, demands and environments have changed. Accordingly, workforce and workplace dynamics in nonprofits need to change to reflect these new realities.

The MSS experience also suggests why many nonprofit organizations are simply not yet ready to capitalize on the abundant—and growing—capacity-building resource in front of them. From the board room to the boiler room, a major shift in thinking and approach is needed. Community-based NPOs need to change their attitudes and ways of doing business if they are to turn the “baby boom” into a “resource boom” and into a new strategic asset for their organizations. They need to apply a different set of assumptions, and, to a significant degree, change their cultures to ensure that they can fully leverage this talent.

What does it take? It takes a parallel and mutually reinforcing set of cultural attributes and specific actions that collectively enable a nonprofit organization to:

- Seize the opportunity presented by the highly skilled Boomer demographic and then...
- Successfully integrate this pool of talent into the fabric of the organization in a way that maximizes its impact on both organizational mission and the community at large.

Some of the key elements that are required to achieve these ends are outlined in the following graphic.

**Leadership/Organization:**

- ▶ Thinks about older adults as an asset, not simply a collection of needs
- ▶ Understands the capabilities, needs and wants of Boomers
- ▶ Understands what “readiness” for engaging 55+ leaders requires
- ▶ Fosters a culture of open communication, where even brutal facts are confronted
- ▶ Creates a learning environment
- ▶ Builds collaborative structures internally
- ▶ Knows the value of partnering externally
- ▶ Is open to developing a new relationship between staff and volunteers
- ▶ Sees the power of teams
- ▶ Is willing to offer individual volunteers and teams of volunteers autonomy with accountability
- ▶ Understands the messiness/ trial and error often associated with managing change

- ▶ Conducts readiness assessment and identifies gaps
- ▶ Plans and implements a systematic change strategy
- ▶ Gains buy-in at every level from board room to boiler room
- ▶ Develops recruiting and messaging strategies that resonate with Boomers
- ▶ Create volunteer roles that fully leverage Boomer leadership and professional skills and experience
- ▶ Develop recruiting staffing and HR processes for volunteers as professional as those for staff
- ▶ Creates integrated communications, interactions and structures that break down barriers between staff and leadership-level volunteers
- ▶ Trains both staff and new Boomer volunteers to optimize knowledge and expertise sharing and fully capitalize on the talents of all
- ▶ Implements goal-oriented performance management for volunteers as well as staff
- ▶ Develops community partnerships that expand organizational and volunteer impact

We have had a lot of “ah-hah” moments where we realized there were a lot of things we had to do first before implementing. We are working on streamlining internal systems. For example, we are trying to upgrade our application to better reflect our interest in working with younger, more active volunteers. We need to update our database with newer descriptions of qualifications for volunteers.

—MSS partner

Building the Foundation: It’s All About Culture Change

MSS project leaders quickly realized that implementing new models for engaging leadership- and professional-level volunteers was much more than simply launching a new program. It was about changing the cultures of their organizations in some fundamental ways. For many sites, the need to build a seedbed for culture change translated into a new and additional stage in their project and a somewhat more protracted start-up process. But for all, taking this extra time upfront paid off. As our MSS partners put it, they needed to “...start slow to move fast.”

What did MSS leaders need to do to effect significant changes in their organizations? Just a sampling gives a sense of the effort. They:

- Made the case for change to their boards and leaders and found champions at various levels of the organization;
- Fostered new ways of thinking about the potential contribution of volunteers;
- Created roles and work patterns for volunteers that had never been tried before;
- Trained and managed expectations of both staff and volunteers;
- Oriented leadership- and professional-level older volunteers to the organization and the realities of the not-for-profit world;
- Created new structures and patterns of interaction between staff and volunteers;
- Trusted volunteers and volunteer teams to operate with greater autonomy than had ever been the case; and
- Shaped capacity-building projects for their new, skilled volunteers rather than using traditional, task-limited volunteer position descriptions.

The focus of their thinking shifted to one of organizational readiness. What did their organizations need to do culturally and operationally to mobilize the potential of the new cohort of older volunteers coming on stream? For example, the Boomer+ Program of the Community Service Society of New York designed an “Organizational Readiness Checklist” and a “Project Needs Assessment” to ensure that it was touching all the bases it needed to—and helping staff and partners optimally match volunteer skills with the capacity-building needs of the organization. There was no guidebook on how to integrate leadership and professional-level volunteers in capacity-building roles into the fabric of the organization. MSS project leaders learned in the trenches and shared their learnings with each other.

Shaping Perceptions: Messaging and Recruiting

While all MSS organizations had significant needs and recognized that there was a growing source of highly skilled talent “out there,” they quickly asked “where and how do we find them?” and “how do we attract them to our organizations?” They tried a variety of media and outreach efforts—from traditional newsletters and presentations before community groups to advertising, email campaigns and social media—but typically found the best approach to be tried-and-true word of mouth. Project leaders, board members, staff and other volunteers worked their networks and seized every opportunity to talk about their programs.

They also found that positioning the opportunity in the right way was critical. Impact, flexibility and challenge: these are the things this new cohort of volunteers is looking for. MSS sites found that mission-related projects with community impact rather than positions or tasks resonated more with their target audience. Clearly leadership-level older volunteers were eager to contribute to the community, but were looking for some assurance that their efforts would make a difference.

Language proved to be a significant factor in reaching potential Boomer volunteers. They are not your grandfather’s volunteers and they don’t want to be communicated with as if they were. Several MSS organizations conducted focus groups and other message-testing forums to ensure that their message was right and that their words would not drive this higher-skilled cohort away.

This approach was epitomized in the focus group findings of one MSS site—the Madison Senior Center Foundation—which learned in its focus groups that:

- Many of the 50+ attendees reacted negatively to “senior” center from the outset, but responded more positively to messages about “intergenerational” or “community” centers.
- “Significant” and “meaningful” “work” resonated more with Boomer professionals than simply volunteering.
- It was perfectly fine to market volunteer positions competitively, i.e., to require an application and a qualifying interview for leadership roles, because the Boomers were used to competing in their professional lives.
- Level and time of commitment must be smartly presented because these new volunteers are experienced, savvy, and want to manage their time. Needs and issues are drivers while “jobs” or “duties” that have no beginning or end are disincentives.

To help replicate MSS site success, NCOA is completing a toolkit for engaging and managing Boomer volunteers. It will include a readiness assessment, training curriculum and other tools.

Coming soon:
ncoa.org/boomersolution

Taking Volunteer Management and Staff-Volunteer Relations to a New Level

Professionalism. Effectively recruiting, on-boarding, managing and retaining leadership volunteers requires taking traditional volunteer coordination/management to the next level in terms of professionalism. MSS organizations needed to manage volunteers much as they managed staff, with a set of well-defined policies and procedures, including documents and processes that support:

- Intake—applications, resumes, detailed skills inventories, interviews;
- Orientation to: the organization, its mission, clients, roles of staff and volunteers, stakeholders, etc.;
- Skillful matching of volunteer capabilities, experience and interests with capacity-building opportunities within the organization;
- Training in preparation for taking on a specific assignment and on team interaction if the project was a team responsibility;
- Ongoing communication and staff-volunteer relations;
- Retention-focused activities;
- Performance feedback and development;
- Recognition; and
- Exit interviews when they were needed.

As one project leader observed, viewing volunteers as critical assets and not just “warm bodies” represents a significant change for many nonprofit organizations. It requires, on the one hand, giving the volunteer manager the respect and recognition in the organization she/he often does not enjoy. And, on the other, it requires treating the new cohort of volunteers as the professionals they are.

Autonomy. In this latter respect, MSS project leaders quickly learned that they had to establish a level of organizational trust and let go of micromanaged control if volunteer leaders were to feel valued. Sites set guidelines and parameters for autonomy and authority for their volunteers. It was important to clarify the expectations of volunteers and staff, and to establish a structure for accountability that would allow a comfortable level of volunteer autonomy with enough staff oversight to assure quality and adherence to required practices. One manifestation of the autonomy was the increasing use of self-directed volunteer teams to manage and implement important projects. In these circumstances, staff members operated more as facilitators than as supervisors.

We have set up a structure, using meetings or reports. I don't lead the meetings, but attend. They plan them and ask me for guidance. It's a gradual process of letting go and making sure there is some accountability with staff. Someone on staff will still have responsibility for this even if not involved day to day.

—MSS Project Leader
Executive Service
Corp of Chicago
Chicago, IL

Higher levels of staff-volunteer integration. In general, MSS organizations found that treating leadership volunteers almost as if they were adjunct staff was the best way to maximize productivity and impact. Creating an organization-wide sense of collegiality and teamwork among staff and volunteers fostered collaboration, a reciprocal perception of value, and a results orientation that benefited all.

But, of course, even with genuine efforts to integrate volunteers and staff, tensions can arise when younger or less experienced staff members are asked to work with volunteers who have extensive outside experience and/or more education. Staff may feel threatened, fear their jobs are at risk or simply feel uncomfortable with this new assertive kind of volunteer. Seeing this as a healthy tension and making this new dynamic work requires balancing the volunteer's need for autonomy with the staff's concern about retaining their authority and job responsibilities.

For most MSS sites, the integration process started with discussions (e.g., on-on-one interviews, meetings or focus groups) to understand how staff felt about the introduction of leadership-level volunteers. MSS project managers learned the importance of addressing the expectations of all involved. For example, they needed to make it clear to staff that higher-level volunteers were not being brought in to do things that staff would otherwise do, but rather to do things that staff cannot do given their other responsibilities and resource constraints—and that the result will be to increase organizational capacity by using skills and experience that the organization lacks. Staff also needed to remind or sensitize the volunteers to the new workplace dynamic and invite their assistance. This generally proved to be a win-win situation given the leadership volunteers' desire to focus on helping accomplish defined goals while working within the structure and mission of the organization.

One MSS site—The Research Foundation at SUNY-Albany—designed its ExcelleShare Program to recruit, train, and place older professional volunteers in area nonprofits. With its largely young staff, the Research Foundation was concerned about a generational and experience divide. To ensure that older higher-level volunteers, Research Foundation staff, and other nonprofit managers worked together well, the ExcelleShare Program:

- Conducted joint informational sessions describing the MSS program, as well as other university programs;
- Scheduled orientation sessions to explain the program's place within the context of the university structure;
- Held “reflection” events and focus groups for nonprofit staff members and volunteers to explore how best to achieve their goals; and

- Developed a small team model based on functional areas like marketing and PR to ensure that the project was optimally leveraging volunteer skills and interests.

What Roles Did Most Leadership Volunteers Play?

The MSS organizations designed a variety of roles based on their organizational needs and then frequently expanded the number of roles when they realized the range of skills that volunteers offered. The key lesson in the endeavor to leverage the talents of leadership-level volunteers was simply that they were more productive, took more initiative, were more satisfied and stayed longer when they felt that their potential for contribution was truly being tapped. Leadership roles most frequently played by 55+ volunteers at MSS organizations included:

- Senior executive (most typically board member)
- Volunteer coordinator
- Project leader/manager
- Fundraiser/development officer
- Ambassador/outreach specialist
- Interviewer
- Emeritus Advisor
- Capacity Corps Leader
- Marketing/Media Specialist
- Graphic Designer
- Strategic Planner
- Event Planner
- Researcher
- Program Evaluator
- Accounting/finance specialist
- Computer specialist

Moreover, the more leadership-level volunteers an organization engaged, the better it seemed to do in terms of perception of their program's success and return on investment of their efforts.

The Importance of Partnerships

MSS organizations found that collaborative partnerships were critical to their success. Accordingly, they established a variety of external and internal partner relationships to reach their goal of increasing capacity and impact through the use of professional and leadership volunteers. One early use of these partnerships was in recruiting. Project leaders identified other organizations with complementary goals and sought their assistance in identifying potential 55+ volunteers. They also referred volunteers who were not good matches for their needs to partners where the fit might be better. One MSS project, located in the continuing education division at a university, partnered with another university department to train volunteers to act as development officers (fundraisers) for small, local nonprofits. In addition to recruiting volunteers for this new role, staff members invited local nonprofits to send their own volunteers to the MSS-site-developed training.

For MSS projects, selection of partners began with self-examination and discussion. To test their organizations' readiness to find and secure strategic external partners they asked such questions as the following:

- Which nonprofits share the same or complementary purpose, values, and vision?
- Which nonprofit serve a similar clientele?
- What is the purpose of the partnership, and what resources and expertise are needed?
- Does the nonprofit have a positive, compatible image in the community that will bring additional credibility to our organization?
- Does the nonprofit have the capacity to take on whatever new responsibilities the partnership will require?
- Does our agency have past experience with the organization in question? If yes, is there an existing partnership agreement in place?

The type of benefits gained varied widely: finding new stakeholders, sharing human resources, mutually seeking or sharing financial resources, exchanging special expertise, producing materials, sharing event venues, or giving each other access to new market segments are examples. MSS sites generally sought to formalize their partner relationships to ensure commonality of understanding and win-win outcomes.

MSS organizations found that in addition to the usual memorandum-of-understanding issues, three things needed to be clearly spelled out in written partnership agreements: the details of the commitment required of each partner; any risk associated with the partnership commitment;

It is important to put things in writing. We started with a handshake, but figured out quickly that wouldn't work well. It is important to delineate responsibilities. For example, both of our organizations have marketing departments with different approaches, so we had to decide on which one to go with so as not to step on anyone's toes.

—Mather LifeWays &
CJE SeniorLife
Chicago, IL

and the benefits of the partnership to all parties. Project leaders generally shared agreement drafts with their internal colleagues to further organizational buy-in and support, as well as solicit questions, concerns and other comments that might help clarify and enhance the partnership.

What It All Means

Older adult leadership-level volunteers represent an extraordinary potential resource for community-based nonprofits. They bring skills, experience and perspective that can truly be transformational for organizations and for communities. But engaging this resource cannot be seen as simply an extension of traditional volunteer programs. NCOA's Models of Significant Service partners have shown the way in terms of what it takes: skillfully planned and executed internal changes, a willingness to innovate and experiment, new roles that take full advantage of Boomer talents, and an open and collaborative environment that unleashes the potential of individuals and teams.

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A. Participating Organizations



National MSS Initiative

- Action for Boston Community Development: Generation of Leaders Demonstration (Boston, MA)
- Big Brothers Big Sisters of Puget Sound: Jefferson County Satellite (Seattle, WA)
- California Polytechnic State University: Center for Nonprofit Organizational Advancement (San Luis Obispo, CA)
- Center for Excellence in Aging Services, University at Albany: ExcelleShare (Albany, NY)
- Center for Volunteer and Nonprofit Leadership of Marin: Leadership Teams (San Rafael, CA)
- Community Service Society's RSVP: Boomer+ Program (New York, NY)
- Executive Service Corp of Chicago: Interim Executive Director Services Model (Chicago, IL)
- Horizon Health: Successful Older Adult Resources (Pierz, MN)
- Jewish Federation of St. Louis' NORC Project: Leadership Link Model (St. Louis, MO)
- Madison Senior Center Foundation, Inc.: The Senior Consultants Model (Madison, WI)
- Mather LifeWays & CJE SeniorLife: Count Me In (CMI) Chicago Life Opportunities Initiative (Chicago, IL)
- Southern Maine Agency on Aging: Capacity Corps Model (Scarborough, ME)

Maricopa County, AZ MSS Replication Initiative

- Arizona Science Center: Friends of Science and Technology Education (Phoenix, AZ)
- Beatitudes Center DOAR: New Volunteer Leadership Structure (Phoenix, AZ)
- Big Brothers Big Sisters of Central Arizona: The Big Experience Project (Phoenix, AZ)
- City of Mesa Arts and Culture Department: The Ubuntu Project (Mesa, AZ)
- Friends of the Tempe Library: Tempe Connections Talent Connection (Tempe, AZ)
- Hacienda HealthCare: Nurse-Mentor Volunteer Model (Phoenix, AZ)
- Interfaith Community Care: The P.E.E.R.+ Program (Surprise, AZ)
- Mesa United Way: The Partnership Committee (Mesa, AZ)
- Sun Health Corporation: Supervised Volunteer/Leader Team (Sun City, AZ)
- The Center for Habilitation: Volunteer Leadership Teams (Tempe, AZ)

B. Underlying Principles and Behaviors

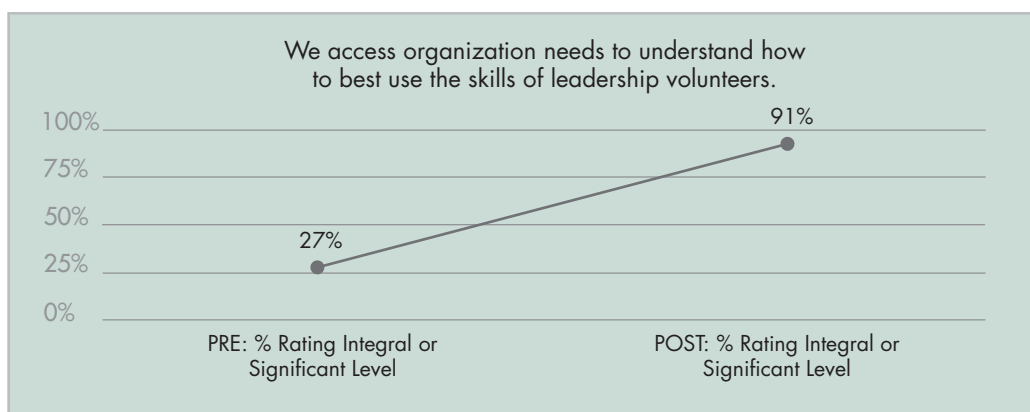


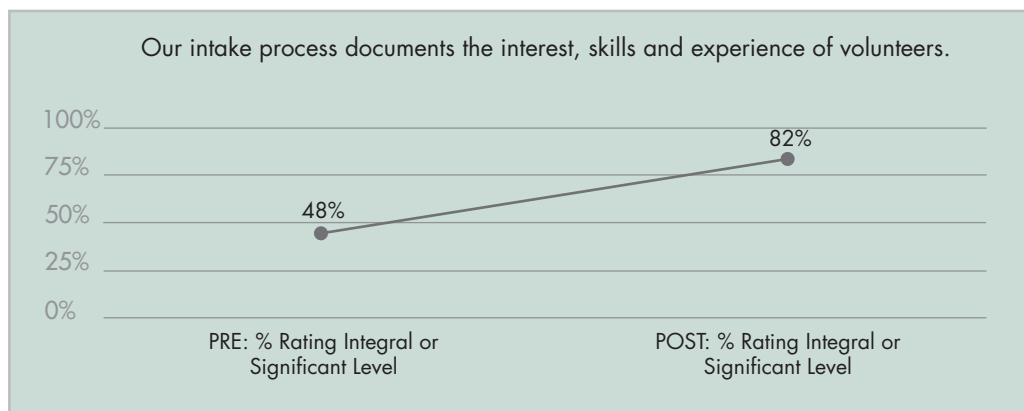
In an earlier phase of RespectAbility research, NCOA reviewed nonprofits across the country to uncover “promising practices” in the engagement of older adult volunteers, practices that truly seemed to advance the state of the art in engaging adults 55+ in socially important work. To further assess the promising practices principles, organizations in the MSS initiative were surveyed pre- and post-implementation of their models to determine whether their actions reflected behaviors imbedded in the principles as they moved forward with their programs. Using a 4-point rating scale, they were asked whether they were 1) not practicing the organizational behavior at this time; 2) practicing it to a limited degree; 3) practicing it to significant degree; or 4) fully integrating it into to their operations. The narrative below describes the patterns of their responses.

Alignment of Participant and Organizational Interests

MSS leaders realized that for engaged adults to be instrumental in meeting organizational priorities they had to become counterparts to and extensions of staff. The greatest areas of growth for MSS organizations reflected their deliberateness in matching organizational needs and the skills of leadership volunteers. The number of organizations that purposefully assessed their own organization’s needs to make best use of skilled leadership volunteers tripled over the course of the project (from 27% at pre-implementation to 91% at the end of the project).

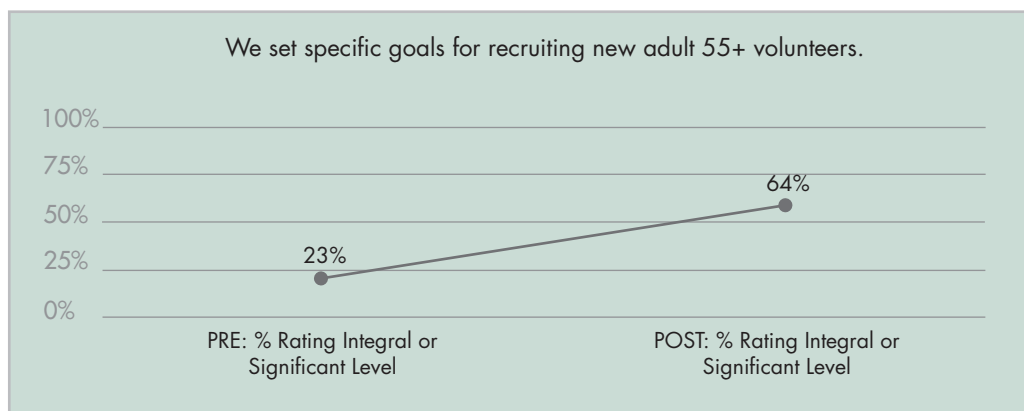
The ability to align leadership volunteers’ needs and interests with organizational needs was further facilitated by documenting volunteer assets through their intake processes (a 34% increase from 48% to 82%).





Valuing the Assets of Aging

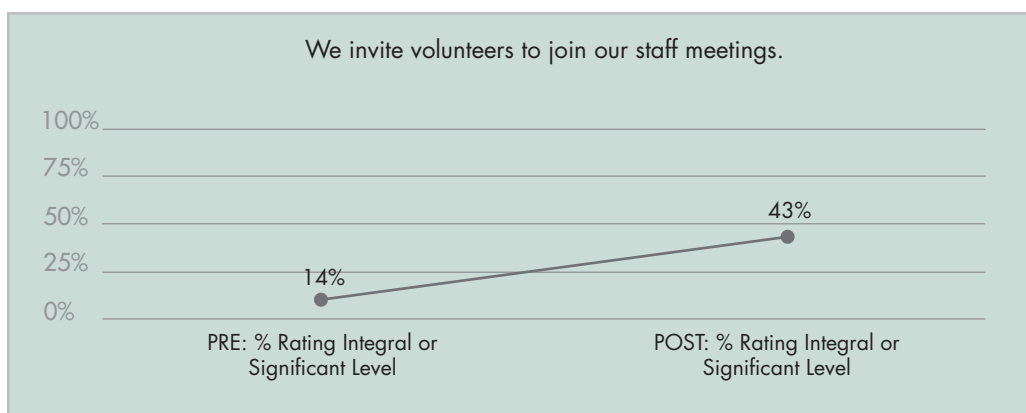
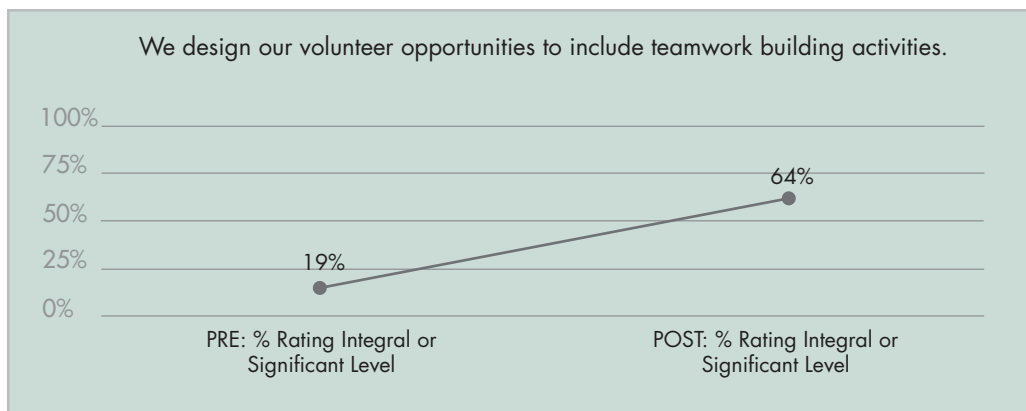
MSS organizations underwent a significant increase in organizational commitment to diversifying the composition of their organization along the age continuum. The number that set specific goals for recruiting 55+ volunteers more than doubled (from 23% to 64% over the course of the project).



Building Intentional Relationships

The MSS organizations quickly learned the value of developing strong relationship bonds between volunteers and staff. They fostered communication, collaboration, and continuous interaction to help realize the asset potential of aging within their organizations. Formal and informal processes evolved to facilitate sharing of responsibility for project design and implementation; create “engagement career ladders”; and increase leadership skill development among the new 55+ cohort and staff alike.

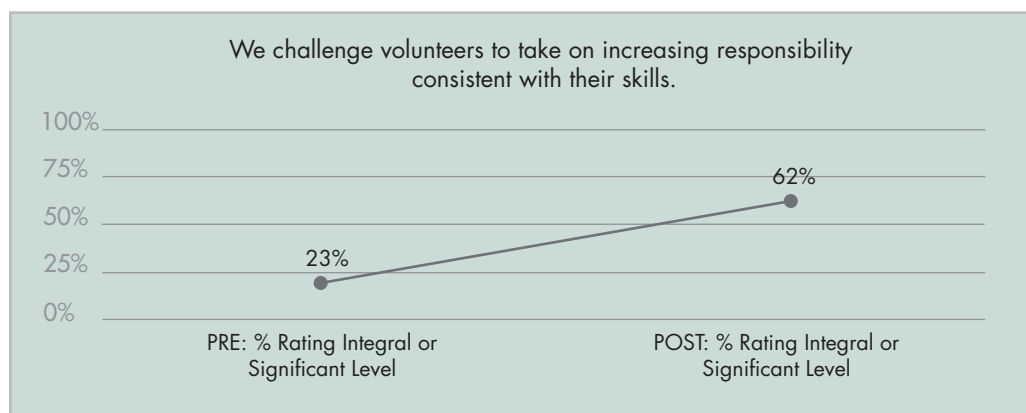
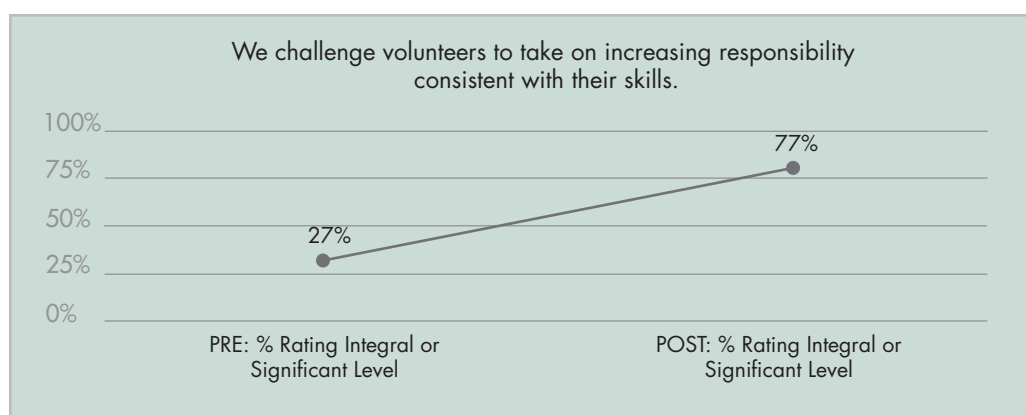
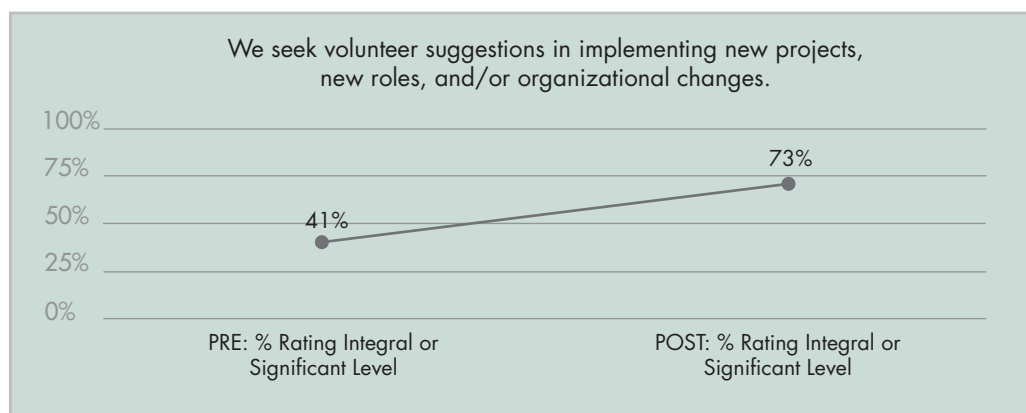
By the end of the grant period, three times as many MSS sites developed purposeful staff-volunteer structures, such as team building activities (from 19% to 64%) and including volunteers as key members in “staff” meetings (from 14% to 43%).



Creating Empowered Participation

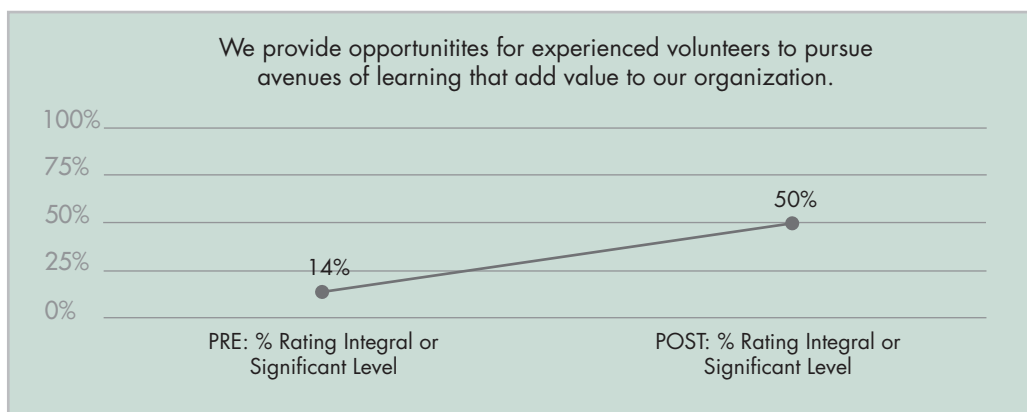
As MSS leaders' trust levels grew, they relinquished control and allowed volunteers to take on increasingly responsible roles. Once staff learned to trust volunteers with their work, they could turn to other organizational priorities and issues. The leadership volunteers became full members of the working teams responsible for achieving the organizations' missions.

MSS organizations increasingly empowered leadership volunteers to assume greater autonomy and self-management. The majority of organizations (73%, increasing by 22%), recognizing the valuable experience of these volunteers, engaged them in the development of project reporting structures, work plans, responsibility descriptions, marketing and recruiting materials, to name a few examples. By the end of the grant period, the number of organizations encouraging volunteers to take on increased responsibility (27% initially, 77% by end of the grant) and allowing volunteer-driven work plans (23% pre-implementation, 62% after two years) had nearly tripled.



Learning as a Pathway to Engagement

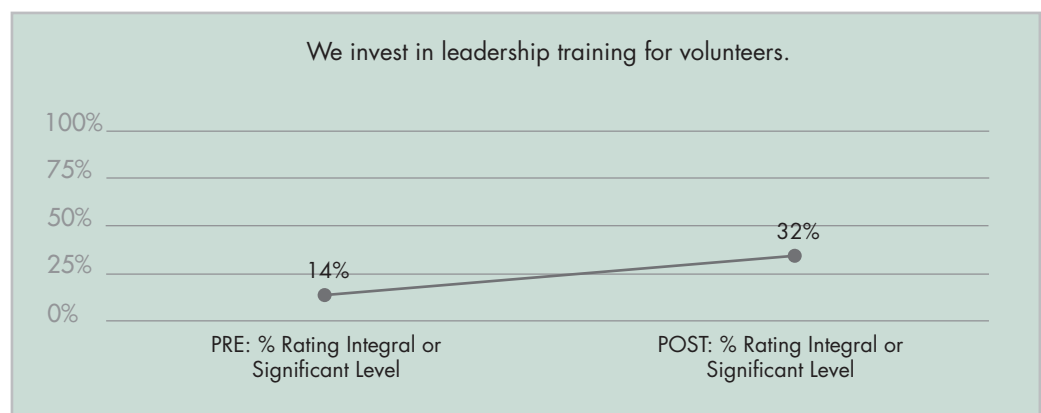
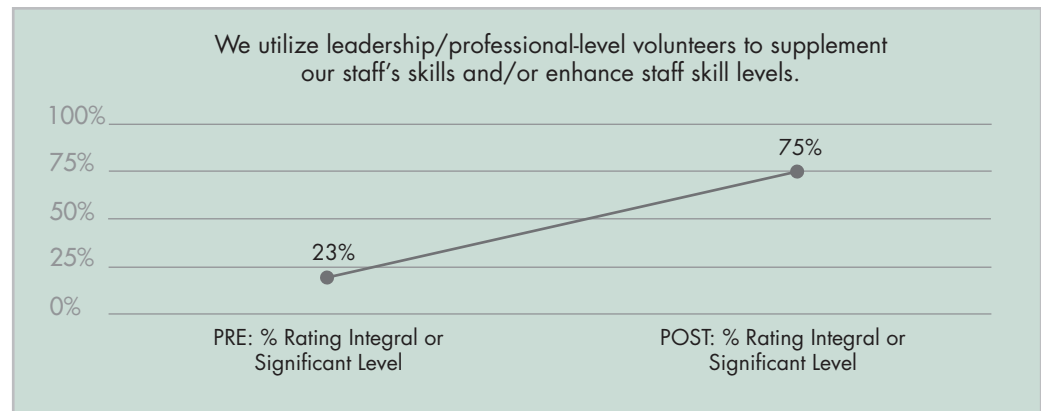
MSS organizations invested in participants' learning by creating opportunities for them to discover their personal and professional potential to contribute to their communities. They incorporated the organization's performance-specific training with orientations that helped the leadership volunteers understand the larger context of the non-profit world, the organization itself, and its clients. They also enabled leadership volunteers to pursue other avenues of learning that contributed to organizational capacity (moving from 14% to 50% of MSS organizations by the end of the grant period).



Developing Capacity by Actualizing Leadership

The most successful organizations incorporated leadership training into their programs, identifying and developing participants with the interest, commitment, and skills to assume sustaining roles. Maximizing volunteer leadership capability enabled staff to work on other organizational priorities and develop new programs and services.

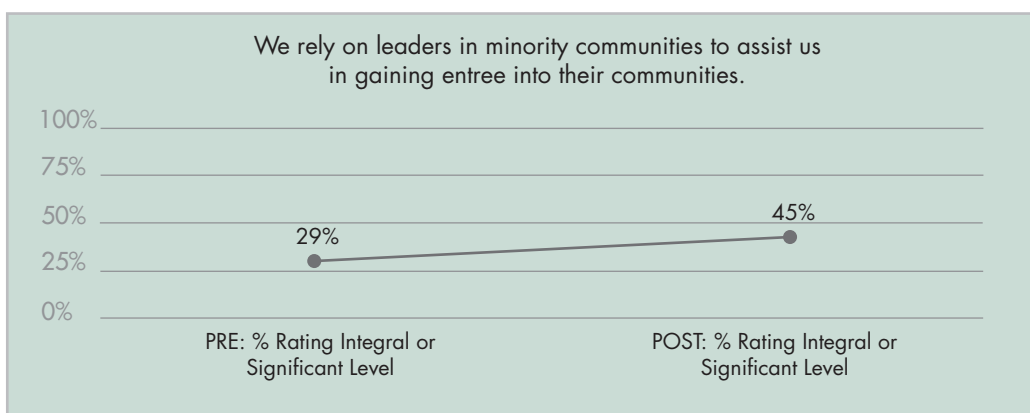
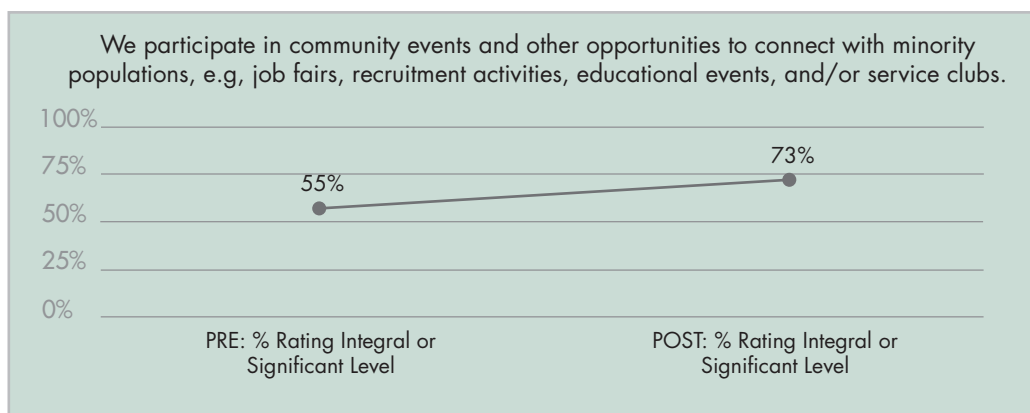
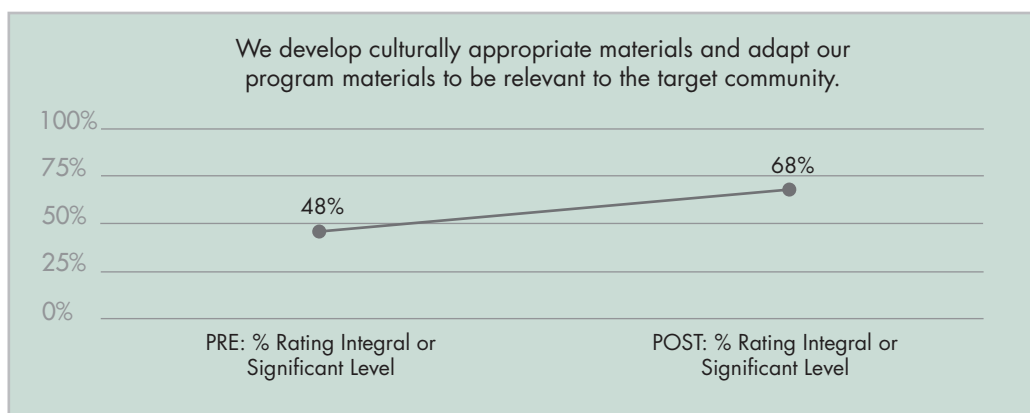
Over the course of their grants, there was a decided increase in the degree to which the organizations leveraged leadership volunteers to supplement or enhance staff skills (a 51% increase, moving from 24% to 75%). Although more modest in accomplishment, MSS sites also increased investment in leadership training for volunteers (32% of MSS organizations at the completion of the project—more than double the number from the pre-implementation survey result of 14%).



Embracing Cultural Competency

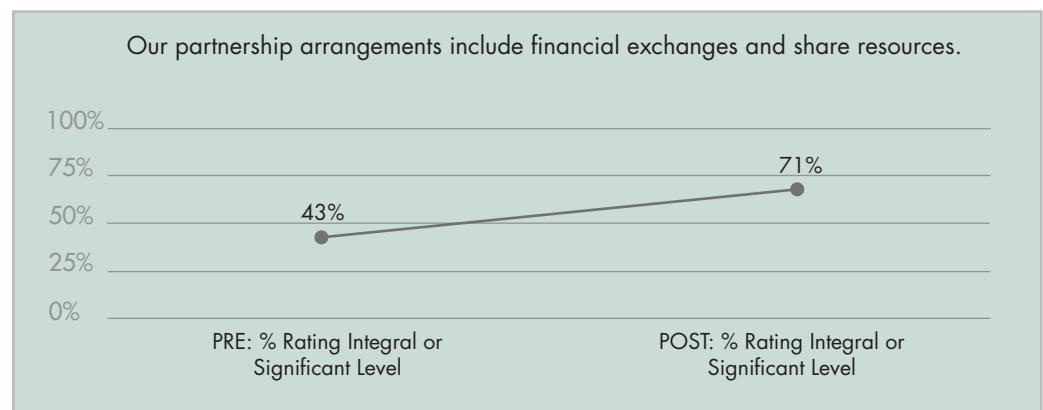
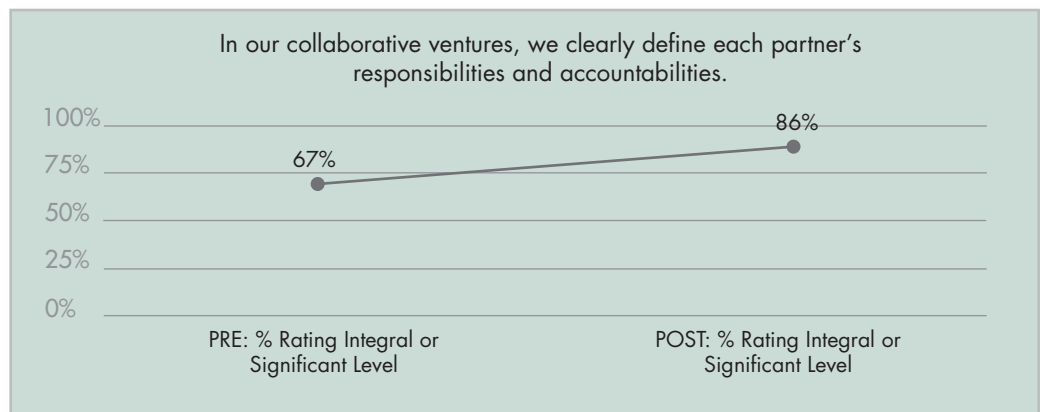
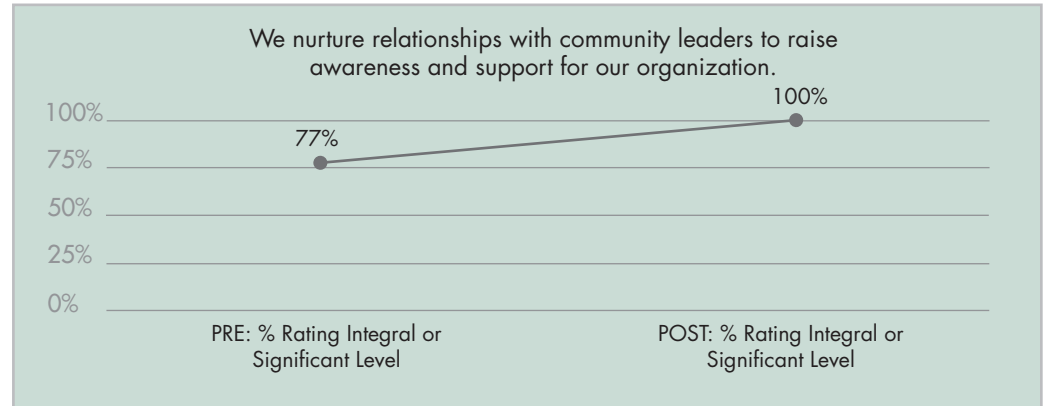
To address the cultural diversity of their communities (clients and potential leadership volunteers alike), MSS organizations increased their efforts to create culturally appropriate program description materials relevant to their target audiences (a 68%, a 20% increase) and used these materials at community events in order to connect with minority audiences (moving from 55% pre- to 73% post-implementation).

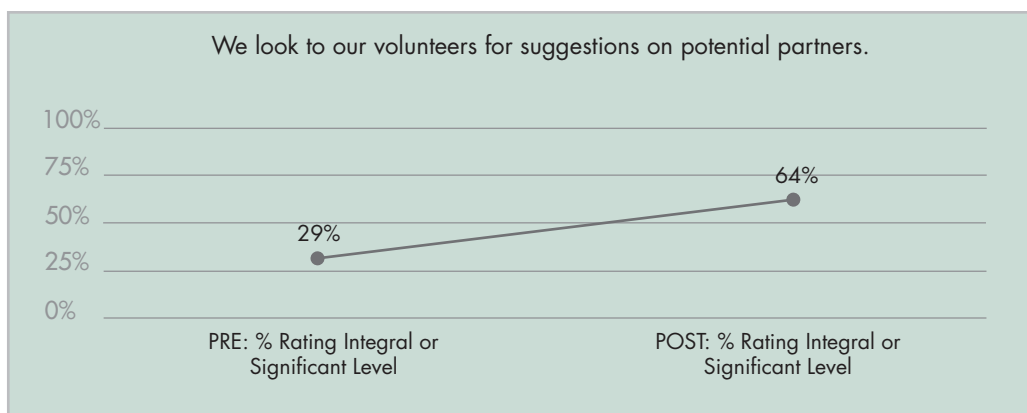
Moreover, nearly half of the MSS organizations understood and engaged minority community leaders in gaining entrée to this important audience (from 29% to 45%).



Putting Meaning into Partnership

MSS organizations learned that effective community partnerships were critical to the success of their programs. They increasingly moved toward more planned, deliberate partnerships, formalizing their relationships through written agreements and memoranda of understanding. Greater focus on leveraging partnerships was shown by several measures in the pre-/post-implementation survey.

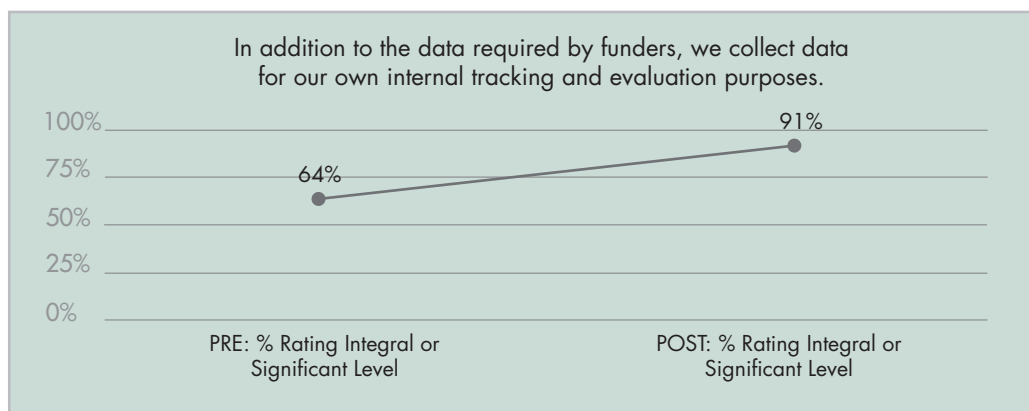


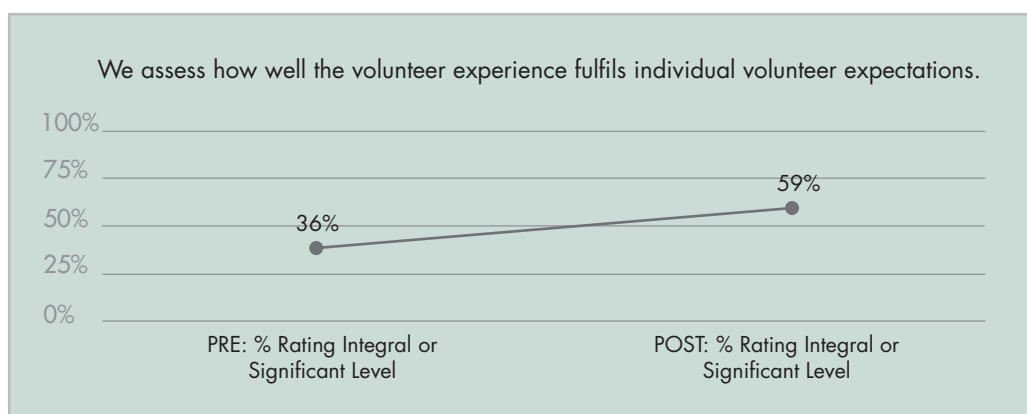
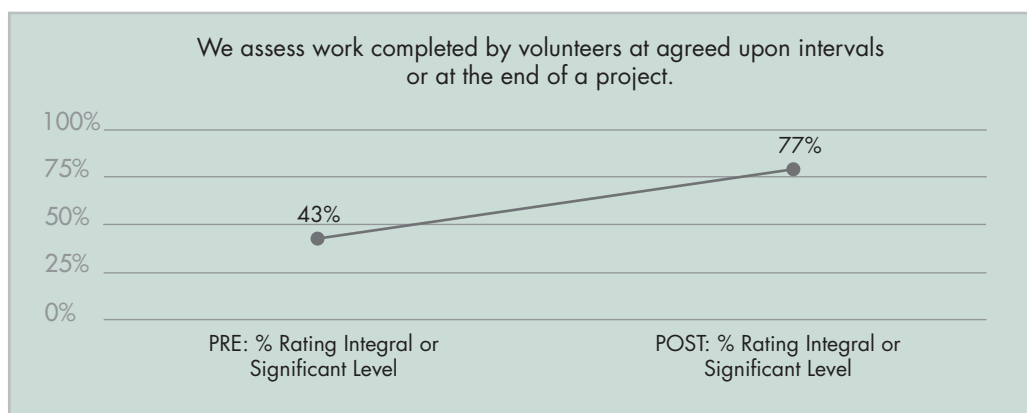


Producing Evidence and Fostering Accountability

MSS organizations recognized the benefit of more formally documenting leadership volunteers' accountability, contributions and results. Documentation also fostered public acknowledgement of contributions by older adults, encouraging sustained commitments, and serving as a powerful outreach.

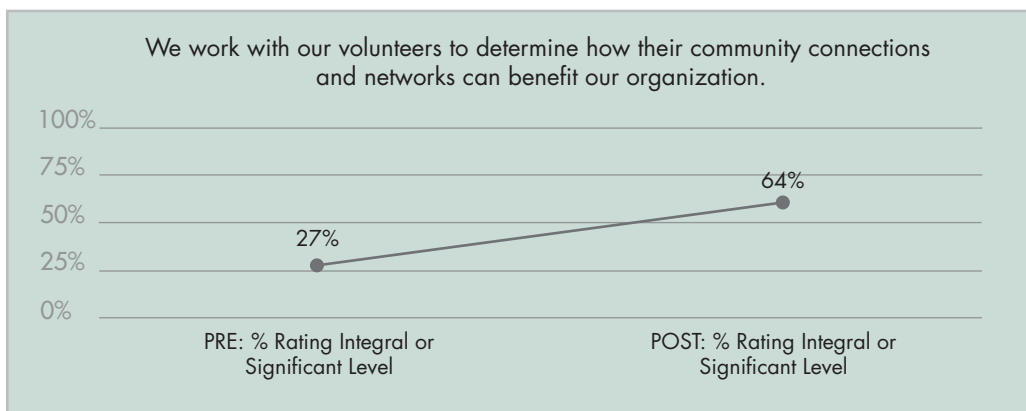
The strongest indication of greater focus by MSS organizations on producing evidence and fostering accountability was the increased and purposeful use of evaluation data for internal decision making (moving from 64% to 91%). In addition, the percentage of organizations reviewing volunteer performance at the end of service and/or at the end of specific assignments jumped from 43% initially to 77% by the end of the grant period. Finally, to help the organizations understand whether the MSS experience fulfilled volunteer's personal expectations, 59% now do volunteer assessments (moving from 36% before implementation).

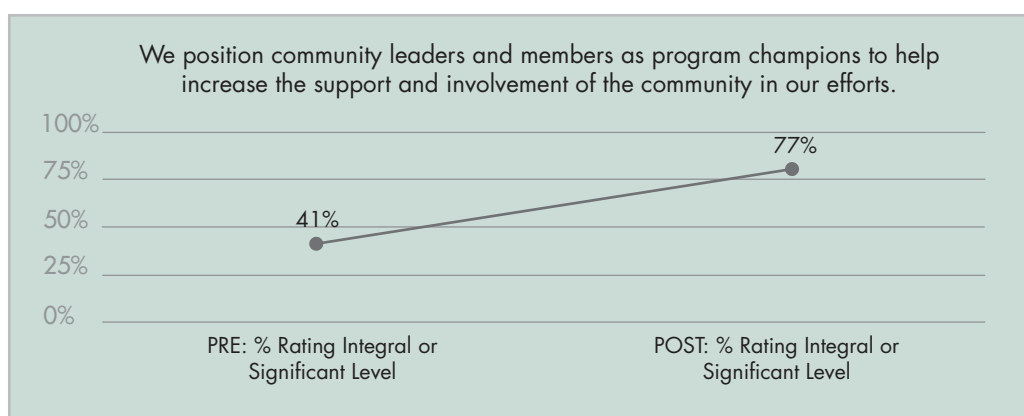
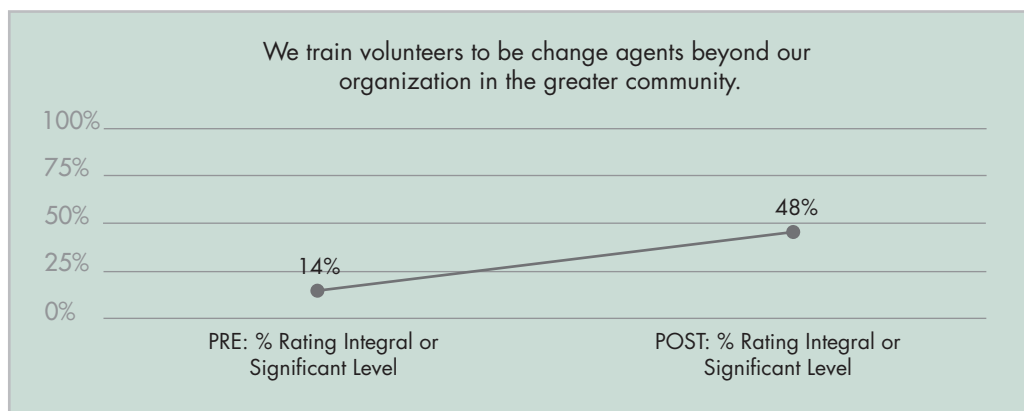




Reestablishing the Foundation of Community

Noticeable over the course of their projects was the degree to which MSS organizations capitalized on the leadership abilities of volunteers to engage the community in their organizations. The leadership volunteers were natural ambassadors for the organizations' causes. By the end of the grant period, two thirds of the MSS organizations were working with their volunteers to utilize their community connections (moving from 27% to 64%, a 37% increase). Two thirds were preparing volunteer ambassadors to promote their organizations within the community (from 32% to 68%, a 36% increase). Similarly, the increase in organizations that were training volunteers to be change agents in the greater community went for only 14% pre-implementation to 48% after. The last powerful shift many MSS leaders made was to identify and position community leaders as program champions to increase the support and involvement of the community in their organizations (moving from 41% to 77% at the completion of the MSS project, a 36% increase).





C. 22 Models of Significant Service at a Glance



In this section of our report, we take a closer look at the individual models and outcomes of the organizations that sought to develop new approaches to engaging leadership-level volunteers to increase organizational capacity. Included below are:

- A comparative overview of the organizations and their Models of Significant Service
 - Organizations
 - Location
 - Mission
 - Models
 - Objectives
 - Roles created
 - Volunteer-staff dynamic
 - Relationships with other organizations and/or the community
- The varying degrees of success achieved in these demonstration projects
- Sufficient detail on each participating organization and its model to enable other nonprofits that are interested in engaging highly skilled 55+ talent to determine if any of the models or practices outlined represents replication opportunities for them. These details include an overview of each organization, key attributes of its model, critical success factors, an assessment of the progress realized at each site, and observations from participants who worked on these projects.

The sites implementing Models of Significant Service represent nonprofits of various types. The areas served by these nonprofits encompass urban, suburban, and rural populations. Several sites are in large metropolitan areas like Chicago, New York, Boston and Phoenix; others are in rural areas like Pierz, a town with a population of 1500 in central Minnesota.

Similarly, the organizations are small, medium, and large nonprofits with budgets ranging from less than \$200,000 to those with annual budgets in excess of \$100 million. Two are university-based projects. Approximately 30% of the sites recruited and trained professional and leadership volunteers for external nonprofits in their area, while the others utilized these new resources in-house.

The following individual profiles provide a quick overview of each MSS site through a “Model at a Glance” chart, plus some basic demographics about the sponsoring organization.

Quotes from volunteers, managers, and staff members bring their projects to life: the pleasures, the hard work, and the accomplishments of participants in these efforts to find new ways to leverage the extraordinary capabilities and life experience of highly skilled adults 55+.

Generation of Leaders Demonstration (GOLD) Action for Boston Community Development Boston, Massachusetts

Organizational mission of ABCD

The mission of Action for Boston Community Development, Inc. (ABCD) is to help disadvantaged individuals, families and communities to escape poverty.

Description of ABCD's Model of Significant Service

Through a structure based on self-directed teams of volunteers, Action for Boston Community Development, Inc. (ABCD) is developing a comprehensive model for the integration of volunteers 55+ into the core professional and managerial functions of a major anti-poverty agency. The Generation of Leaders Demonstration (GOLD) transforms the traditional model in which services are delivered by “professionals” to “clients” with “volunteers” serving essentially as low-skill helpers toward a model of service in which community mutual support is the central theme. The goal is to recruit as many as 90, 55+ volunteers with skills related to human resources, banking and finance, fundraising, planning and evaluation, teaching, medicine, entrepreneurship and many other fields.

Organizational structure and coordination

In an effort to fully integrate volunteers into the organizational structure, they are expected to report directly to the department heads in charge of their function. Volunteers are co-equal with staff and work in self-directed teams.

Major accomplishments realized during two-year period

- Recruited a new group of 17 volunteers who are not generally asked to volunteer by explaining that they would structure and carry out new programs or enhance existing programs.
- Provided opportunities for volunteers to work with a population with whom previously they had little contact and to derive a true sense of giving back to the community.

Keys to success

- Seek volunteers through direct contact rather than flyers or PSAs to allow the potential volunteer to ask questions about the program and often refer you to someone else if (s)he is unable to volunteer.
- Establish clear communication guidelines. For example, if a volunteer is not working out, the program director should immediately inform the project manager or if the volunteer is not satisfied with the placement, the project manager should be informed immediately.
- Establish clear performance expectations at the beginning of the program and to maintain open communication between the program director and the volunteer.

New volunteer roles created and skills/experience utilized

The Model creates 10 distinct job titles, including project coordinator, curriculum developer, project data Manager, and fundraising manager requiring skills in human resources, banking, finance, planning, evaluation, and teaching.

Jefferson County Satellite Project Big Brothers Big Sisters of Puget Sound King, Pierce, & Jefferson Counties, State of Washington

“My role focused on collaboration between BBBS and The Boiler Room, another youth services agency in the community. This was to bring awareness to older youth about BBBS and combine forces to bring events and information to existing matches and an opportunity for mentorship from older youth. I have also been a member of the partnership council.”

—Leadership Volunteer

Organizational mission of Big Brothers Big Sisters

To partner with actively involved community members to match caring adults with children, both of whom benefit from our one-to-one mentoring programs.

Description of BBBS’s Model of Significant Service

The Big Brothers Big Sisters’ model builds core capacity that will create long-term sustainability in a geographically separate program location. Using experienced 55+ volunteers as adjunct members of the Agency’s Leadership Team, the project will design and implement an organizational structure, a customized fundraising plan, and tailored marketing and recruitment activities for the satellite location.

Organizational structure and coordination

The goal is to integrate this function into the agency’s leadership structure over two phases:

Year 1: Function shared by Volunteer Organizational Development Coordinator, BBBS Branch Manager, and RSVP’s Volunteer Manager.

Year 2: Volunteer Organizational Development Coordinator assumes responsibility as a member of BBBS’s leadership team.

Major accomplishments during two-year period

- Increased the number of children served by 33% and increased local funding by 69%. Increased management capacity by adding new functions related to analysis and strategic planning, recruitment (especially of 55+ volunteers), long-range development planning, and volunteer program development.
- Added five “contracted” Leadership Volunteers, 12 people engaged on Partnership Council, and increased number of 55+ volunteers from 11 in 2007 to 27 in 2008.

“Many of us (55+) have finished raising our families and have made our mark on the business community. This is a way for them to pay back. There are many people in a community who are willing and able to help but don’t know where—you need to locate them and connect them to your agency.”

—Leadership Volunteer

- Created customized action plans for recruitment and development.
- Engaged a leadership volunteer to begin creating mini-manuals for process initiated by MSS project.

Keys to success

- Present the model at as many community gatherings as possible to expand marketing and community outreach.
- Strengthen critical partnerships by including representatives in all important meetings, on email updates, and other on-going communications.
- Find ways to reach “community connectors”, i.e., influential community members, who then help with informal networking.
- Ensure volunteer satisfaction by having a good understanding about the roles involved, who is responsible for what, expected outcomes, and timeframe.

New volunteer roles created and skills/experience utilized

Created roles for fundraising coordinator, marketing and communications coordinator, organizational development coordinator, and volunteer coordinator with skills and experience in strategic planning, team management, project coordination, fundraising activities, marketing, communications, and human resources.

Center for Nonprofit Organizational Advancement California Polytechnic State University San Luis Obispo, California

Organizational mission of Continuing Education’s Osher Lifelong Learning Institute

To offer retired residents of the Central Coast a wide variety of learning, service, and leadership programs. These shall be designed to be intellectually stimulating in an informal and non-competitive environment.

Description of the Institute’s Model of Significant Service

Using the model established through the California Polytechnic State University’s Osher Lifelong Learning Institute, the Center for Nonprofit Organizational Advancement model offers training to create cohorts of volunteer nonprofit development/fundraising officers. In addition to training volunteers 55+ for this role, the program helps nonprofit organizations understand how to utilize these newly-trained volunteers’

expertise and how to evaluate their traditional fundraising efforts. With the help of these volunteers, nonprofit organizations then are able to move their capacity for raising external financial support from simple fundraising to a long-term advancement strategy.

Major accomplishments realized during two-year period

- Created and modified the certificate course content for the Advancement Officer training program.
- Trained 27 Development/fundraising Officers.
- Established this certificate program as a regular joint offering through Cal Poly's Continuing Education Center and the Nonprofit Service Center.

Keys to success

- Use word of mouth advertising to recruit Advancement Officer volunteers.
- Form a partnership with a training organization, such as the Nonprofit Service Center that has curriculum and instructors for training Advancement Officers.

New volunteer roles created and skills/experience utilized

Created Volunteer Nonprofit Development/fundraising Officer role for interested nonprofits. Experience and skills required include communications, team building, leadership, and management.

Count Me In (CMI) Chicago Life Opportunities Initiative (CLOI) Mather LifeWays & CJE SeniorLife Chicago, Illinois

"My Mentor was very helpful with formalizing our policies and procedures, creating job descriptions, and providing training a wide variety of areas. She is also a great resource in the aging field and it was wonderful to be able to bounce ideas off of her."

—Participating Nonprofits

Organizational Mission of Count Me In

To be a catalyst for people age 50+ who are seeking opportunities for self-development and civic engagement, and to be a resource that provides tools for communities to uncover older residents' assets and to mobilize them to address community needs.

Description of Chicago Life Opportunities Initiative's Model of Significant Service

Chicago Life Opportunities Initiative's Count Me In (CMI) model seeks to create systemic change in the way community organizations value and engage older adults. By creating three leadership roles for older adults—

“The most significant outcome achieved was building awareness in the nonprofit’s staff that volunteers can be utilized in non-traditional roles. When a project or task needs to be completed, they now ask the question, “Can a volunteer do this?”, rather than just assuming that a paid professional needs to be hired. This increased flexibility may help the organization weather the current turbulent economic environment a bit better because staff is thinking more creatively about how to source professional services.”

—A CMI Mentor

“Contrary to what we had expected, there was no competition for resources or ideas between the groups. All of the participants were open to sharing their ideas and resources because the concepts were so new to most of them and they were all in the same boat.”

—A Project Director

CMI Director, ten CMI Mentors, and twenty Volunteer Managers—CMI recruits older adults:

- Who are seeking opportunities for self development and service in leadership roles in community organizations, and
- Who can provide expertise to help organizations use older volunteers’ knowledge and skills to increase the organizations’ capacity to serve the community.

In a cascading design, the Director recruits the Mentors who will learn how to use their professional skills and expertise to assist five types of nonprofits in several areas, including developing Volunteer Managers who implement a meaningful older adult volunteer program.

Organizational structure and continuing project coordination

The CMI project director reports to the Advisory Board of Chicago Life Opportunities Initiative (a joint venture of Mather and CJE) and CLOI’s Executive Director.

Major accomplishments realized during two-year period

- Eight Mentors developed and implemented volunteer leadership programs in 10 nonprofit organizations, resulting in 23 new leadership volunteers working in areas such as marketing, development, community outreach, board development and public relations
- Sponsored joint meetings for all participants (Mentors and nonprofits) to share information and to receive additional training on volunteer leadership topics, including recruitment, integration with staff, and identifying roles.

Incorporated CMI “lessons learned” in Legacy Leadership Institute for fund development.

Keys to success

- Utilize networks of personal and professional colleagues to identify potential Mentors and/or organizations for participation in program.
- Leverage partnerships with other organizations for their talent and experience to enhance CLOI’s areas of expertise and budget.
- Provide on-going training for Mentors in regularly scheduled meetings.
- Encourage flexibility on part of the Mentors “to meet the nonprofits where they are” regarding organizational readiness to use professional volunteers/

- Schedule joint meetings of Mentors and nonprofit participants to embrace the learning laboratory concept.

New volunteer roles created and skills/experience utilized

Count Me In Mentors, Volunteer Managers at partner nonprofits.

Human resources (recruitment and selection), curriculum development, training, and team-building experience and skills

RSVP's Boomer + Program Community Service Society of New York

Organizational Mission of Community Service Society of New York

To identify problems that create a permanent poverty class in New York City and to advocate systemic changes required to eliminate such problems. CSS focuses on enabling, empowering, and promoting opportunities for low-income families and individuals to develop their full potential, to contribute to society, and to realize social, economic, and political opportunities.

Description of CSSNY's Model of Significant Service project

Based on the accumulated experience in utilizing professional/leadership volunteers, expected to produce two workshops and curricula: Utilizing Baby Boomers Effectively in Your Agency for nonprofits and The Benefits of Volunteering for prospective volunteers. Through the nonprofit training, volunteer supervisors reframe their thinking on volunteer utilization, analyze their agency's "big picture" needs, develop professional/leadership volunteer assignments, and effectively and efficiently recruit, supervise, and recognize baby boomer volunteers. The training will be offered to nonprofit agencies, online to other RSVP sites, and to other corporate and nonprofit volunteer managers via webinar. The volunteer recruitment training will be presented by outreach volunteers to targeted baby boomer audiences at lifelong learning centers, professional associations, and corporate retiree events. Volunteers also provide nonprofit technical assistance and "train the trainers" so they may further disseminate the model. A Boomer+ Task Force, including the AmeriCorps RSVP Service Leaders, CSS project staff, volunteer project teams, retired baby boomers, nonprofit staff/volunteers, government officials, university and corporate representatives, help implement the Boomer+ Program and develop the workshops and curricula. The Boomer+ Program Project Director works directly with two RSVP Service Leaders who will each directly supervise

"[The work at CSSNY] satisfied my creative, entrepreneurial spirit and my need to "give back." The experience gave me a tremendous sense of achievement, provided me with the opportunity to meet new and interesting people, and expanded my horizons. I've learned a new "jargon" that is used in the not-for-profit arena and gotten a different perspective on doing business."

—Boomer+ Volunteer

“In today’s economic times, volunteers can save you [nonprofits] money and since they not looking to build a career in the traditional sense at this point, volunteers are not looking to “displace anyone.” People 55+ who have had successful careers are interested in continuing to use their skills, abilities, and creativity on an ongoing basis and have a strong desire to bring value to an organization. Volunteers’ skills and abilities can make your job easier and even help serve your clients more effectively. The diverse backgrounds of volunteers can be an asset to your organization.”

—Boomer + Volunteer

five to ten professional/leadership volunteers. Based on the experience in utilizing professional/leadership volunteers, two workshops and curricula will be produced: Utilizing Baby Boomers Effectively in Your Agency for nonprofits and The Benefits of Volunteering for prospective volunteers. Through the nonprofit training, volunteer supervisors reframe their thinking on volunteer utilization, analyze their agency’s “big picture” needs, develop professional/leadership volunteer assignments, and effectively and efficiently recruit, supervise, and recognize baby boomer volunteers. The training will be offered to nonprofit agencies, online to other RSVP sites, and to other corporate and nonprofit volunteer managers via webinar. The volunteer recruitment training will be presented by outreach volunteers to targeted baby boomer audiences at lifelong learning centers, professional associations, and corporate retiree events. Volunteers also provide nonprofit technical assistance and “train the trainers” so they may further disseminate the model. A Boomer+ Task Force, including the AmeriCorps RSVP Service Leaders, CSS project staff, volunteer project teams, retired baby boomers, nonprofit staff/volunteers, government officials, university and corporate representatives, help implement the Boomer+ Program and develop the workshops and curricula.

Organizational structure and coordination

The Boomer+ Program Project Director works directly with two RSVP Service Leaders who each directly supervise five to ten professional/leadership volunteers.

Major accomplishments realized during two-year period

- Developed one workshop for prospective volunteers and two workshops (in partnership with Temple University’s Center for Intergenerational Learning) on utilizing capacity building volunteers.
- Recruited and placed 50 professional and leadership volunteers

Keys to success

- Having a clear and powerful marketing message for internal (staff) and external (volunteers) audience to communicate potential of professional volunteers
- Developing critical partnerships with organizations already using professional volunteers and with organizations having large pools of potential volunteers
- Conducting needs assessment with staff to determine roles professional volunteers could fill
- Being flexible with volunteers regarding their skills and desire for multiple short-term volunteer roles and activities.

New volunteer roles created and skills/experience utilized

- Creates roles for 50 new volunteers, including Agency Liaison, Graphic Designer, Interviewer, Fundraiser, Outreach Specialist, Program Evaluator, Recruitment Specialist, Research Specialist, Special Events Coordinator, and Strategic Planner.
- Skills utilized include computer, writing/editing, research, graphic design, interpersonal, strategic planning, and event planning.

Leadership Teams Center for Volunteer and Nonprofit Leadership of Marin San Rafael, California

“Ostensibly I am a volunteer consultant helping various non-profits deal with various issues and problems--mainly in the areas of sales, marketing, strategic planning, and board issues/development/recruitment. Though often, I’m more of a therapist/cheerleader letting people vent and trying to boost morale at the same time. At other times, I feel like I’m a miner searching for diamonds--cutting through all the rubble to get to the diamond. In other words, I have to really dig and probe to ascertain and identify what the REAL problems/issues are.”

—A Volunteer

Organizational mission of Center for Volunteer and Nonprofit Leadership

To develop a vital and engaged community dedicated to building and sustaining the quality of life in Marin by:

- Enriching and strengthening volunteerism and nonprofit organizations;
- Enhancing community involvement and leadership; and
- Promoting the impact and value of the nonprofit sector.

Description of the Center’s Model of Significant Service

The purpose of the Center for Volunteer and Nonprofit Leadership of Marin’s model is to develop Leadership Teams to provide nonprofit member agencies with access to free professional consultative services for infrastructure and organizational enhancements. The Center works with Marin’s nonprofits to create meaningful volunteer opportunities that will enhance the agencies’ capacity and ability to fulfill their mission. The Center recruits highly skilled adults 55+ for two Leadership Teams to fill these newly created volunteer opportunities. In addition to enhancing agency capacity, the work of these Master Volunteers also expands the Center’s own management service program, increasing its ability to provide nonprofits with management, resources, strategies and tools to build capacity.

Organizational structure and coordination

The leadership teams are supervised by the Center’s Manager for Volunteer Services and the Manager for Management Services. Both report to the Center’s Executive Director.

“Are you ready to perform at the same level as a volunteer as you did as a paid professional? Are you clear as to the commitment you are willing to make? Are you prepared to do more listening than speaking? If the answers to these questions are “yes” you can contribute as much, and feel as rewarded, as you ever did in your pre-retirement life.”

—Volunteer about
Attracting Other
Volunteers

Major accomplishments during two-year period

- Established a single Civic Engagement Leadership with 34 professionals offering a wide variety of backgrounds and skill sets.
- Worked with 35 different nonprofits on Leadership Service Projects with an average length of three months
- Established a “Free Advice on Fridays,” providing brief consultations to nonprofits on management, governance, human resources, and budget issues. Fifty-five agencies have met with CELT Members for these one-hour consultations.
- Developed an on-line application process for potential leadership team members and a training program for new consultants.

Keys to success

- Develop a close working relationship with the nonprofit community to establish need for and explore potential of using professional and leadership volunteers.
- Solicit ideas and information from the volunteers about how to appeal to other professionals and about roles volunteers want and expect to fulfill.
- Use Memoranda of Agreement to clearly define roles and outcomes for both volunteers and nonprofits with which they work.

“Accomplishments are only attainable when one or two major benchmarks are accomplished. The first is developing a trusting relationship and the second is providing solid tangible thoughts to the issues being presented. Once you have developed the trusting relationship you can probe deeper and even request additional people to be involved from the NPO if needed. I have found this to be the difference between a great success and a mediocre outcome. Once a NPO becomes engaged with a member of CELT they start to learn the value we can bring to the table. However the major challenge is getting the EDs to recognize they have an issue that we can provide positive input to.”

—Leadership Team Member

New volunteer roles created and skills/experience utilized

Created roles for specialists in the areas of human resources, executive and management coaching, and business planning.

Interim Executive Director Services Model Executive Service Corps of Chicago Interim Executive Director Services Model Executive Service Corps of Chicago

“This is very engaging work. This particular experience is contributing to program development and is much more in line with the executive challenges that I enjoyed when I worked in a university.”

—Member of the
Volunteer Team

Organizational Mission of Executive Service Corps

ESC’s experienced and trained volunteer consultants strengthen nonprofit organizations across the greater Chicago area by bringing them leadership, management and governance skills that are critical to the growth and sustainability of the nonprofit sector.

Description of ESC’s Model of Significant Service

The Executive Service Corps (ESC) of Chicago’s Interim Executive Director Services model develops and provides interim executive director services for organizations needing temporary leadership to ensure stability, continuity, and efficacy as they undergo executive transition. The project provides new and challenging term-limited opportunities for meaningful work for retired Executive Directors, along with new opportunities for ESC volunteers to develop and manage the program as part of ESC’s comprehensive Executive Transition Management program.

ESC Volunteer Leadership Team members:

- Recruit, screen, and train potential Interim ED candidates;
- Market to and assess prospective clients;
- Refer Interim ED candidates to interested organizations in transition;
- Provide ongoing professional development opportunities for the Interim EDs; and
- Ensure client satisfaction.

At the same time, highly-experienced Interim ED candidates bring their years of experience, expertise, and knowledge to ESC, strengthening the agency’s impact as they work with ESC volunteers in various capacities.

Mr. X kept us afloat, running, and additionally started to improve many of our internal operations... he brought a sense of order and responsibility to the organization as well as enabling the organization to continue to move forward during this time of uncertainty.”

—Client Where an
Interim ED Was Placed

Organizational structure and continuing project coordination

Project was initiated and coordinated by ESC’s Vice President of Consulting.

Phase I: VP Consulting and Volunteer Leadership Team share coordination of project.

Phase II: Volunteer Leadership Team assumes responsibility for functions outlined above in the description of ESC’s Model of Significant Service. In addition, the Leadership Team developed most of the operational processes, tools and resources to manage the program. They continue to be engaged with full ownership of the program.

Major accomplishments realized during two-year period

Training – Trained 40 Interim EDs for potential referral to nonprofits undergoing leadership transitions. Developed curriculum materials for use in future trainings. After the initial training, experienced Interim ED volunteers replaced outside facilitators in planning and delivering the training.

Client engagement – Volunteer leadership team placed fourteen newly-trained Interim EDs in client organizations. (8 engagements completed, 6 in process.)

Through written feedback, anecdotal information, and emails, the ESC staff concluded that the Interim EDs are overwhelmingly satisfied with the training and the ongoing learning experiences, the opportunity to be engaged in meaningful work, and the potential for additional income. The leadership volunteers continue to be greatly satisfied with their volunteer experiences.

Replicable process – Produced set of materials that can be used by other Executive Service Corps affiliates to develop their own Interim ED consulting practice, including an Operating Guide documenting processes and forms for the volunteer leadership team; a Tool Kit (the training workbook) for Interim EDs to use in their on-the-job performance; and a Facilitator’s Guide, documenting the instructional design and delivery plan for the Interim ED trainers.

Volunteer team – Team of nine leadership volunteers oversees ongoing process of recruiting, screening, training, and managing the referral of ESC’s Interim EDs as well as the quarterly continuing professional development sessions.

Positive client feedback – Board members at nonprofits where the Interim EDs have been placed have expressed satisfaction with the services provided by ESC-trained Interim EDs.

Keys to success

- Recruit a strong and committed volunteer leadership team at the outset using personal contact outreach.
- Secure sustained commitment of volunteer leadership team to ESC and the Interim ED program.
- Utilize thorough and careful screening, interviewing, and reference checking of Interim ED candidates.
- Create a “Continuing Learning Community” for the Interim EDs (led by the volunteer leadership team) with quarterly meetings for on-going professional development.
- Maintain regular and complete communication with all parties, including the volunteer leadership team members, Interim ED candidates, and clients.

New volunteer roles created and skills/experience utilized

- 8-12 Volunteer Leadership Team members and 30-40 Interim ED trained candidates in the referral pool
- Human resources (recruiting, training, professional development), marketing, management, and significant executive director experience and skills.

Successful Older Adult Resources (SOAR) Horizon Health

Organizational mission of Horizon Health

Horizon Health is committed to providing healthy living options for people within the communities served by the organization.

Description of Horizon Health’s Model of Significant Service

Horizon Health’s Successful Older Adult Resources (SOAR) model seeks to engage older adult volunteers in leadership roles to improve Horizon Health’s organizational capacity in fundraising, volunteer management, and project development as well as that of the community. The primary objectives of SOAR are to:

- Identify and recruit older adults into volunteer service;
- Provide these adults with personal leadership training and education;

- Help them find challenging, high-impact volunteer opportunities;
- Recognize them for their contributions in meaningful ways.

SOAR functions as a self-directed team of 8-10 older adult volunteers who develop and implement the entire program based on the interests, attitudes, and ideas defined by older adults for older adults.

Organizational structure and coordination

The SOAR project director reports to Senior Resource Division Director.

Major accomplishments realized during two-year period

- Recruited a 10-member leadership team to research program content and develop marketing materials.
- Using local speakers and facilitators, conducted two educational sessions for professional and leadership volunteers.
- Placed program graduates as volunteers in local non profits in high impact areas such as group facilitators, volunteer coordinators, and project planning.
- Received requests from area nonprofits to send their own volunteers to the educational sessions.

Keys to success

- Implement initial marketing as early as possible and follow up with radio and newspaper ads to reinforce the message to potential volunteers.
- Emphasize to 50+ volunteers that the training is a free education class designed specifically for them.
- Develop complete job descriptions, including time assessment required, detailed job explanation, educational requirements, and goals, for volunteer roles.
- Conduct an orientation process for new volunteers.
- Add an education component to the annual volunteer appreciation to increase attendance.

New volunteer roles created and skills/experience utilized

Created roles for 20+ volunteers in areas such as Event Specialist, Care Team Coach, Volunteer Site Coach, Hospice Volunteer Mentor, Project Research Specialist, and Program Design Specialist. Skills/experience required include financial planning, logistical support, event planning, and training.

Project and Team Consultant Project Madison Senior Center Foundation, Inc. Madison, Wisconsin

“Volunteerism gives us something to do with the 3,000 hours annually that we have when we retire, and to use the skills of a lifetime in the way you choose and when you want. I like the idea of significant work.... I want meaningful work and a creative project that meets my individual needs and interests. I may want to try new things, and I may not know what my passions and values are yet.”

—A Volunteer

Organizational Mission of Madison Senior Center Foundation

To involve older adults in their community and the Senior Center as leaders, teachers, and learners; to provide a balanced, diverse, and coordinated program; and to promote the Senior Center as a model for the aging adult and for an aging society.

Description of Madison Senior Center’s Model of Significant Service

The Project Consultant model initiates and explores two new strategies in the Madison (WI) Senior Center Volunteer Program. Two self-directed teams of senior adult volunteers focus on public relations/marketing and on senior program development/expansion for the Madison Senior Center. These teams will:

- Create a PR campaign and community awareness of the Senior Center;
- Map city-wide senior programs;
- Design an outreach effort of off-site Senior Center programs.

In addition to the two self-directed teams, individual Senior Consultants staff selected Senior Center-sponsored community volunteer projects, which focus on the education of youth, elimination of illiteracy, support of active aging, and community safety initiatives. Both individual Consultants and Leaders of the self-directed teams are integrated into appropriate Board of Directors committees, given staff and financial support, and, in some cases, receive an annual stipend.

Organizational structure and continuing project coordination

The consultants and self-directed teams report to the Director of Senior Center who is assisted by a project coordinator during the initial grant period.

Major accomplishments realized during two-year period

- The PR team developed a DVD and Power Point presentation for use by Speakers Bureau volunteers in community presentations.
- A Recognition team has been developed to recommend new and meaningful ways to reward and honor volunteers.
- An LGBT Senior Alliance Team has met to develop programs for members of the LGBT senior population.

- Senior Center managers regularly identify roles for highly qualified volunteers, and are identifying self-directed senior teams around special activities and organizational initiatives.
- The Senior Center's program budget includes financial support of volunteers, including volunteer recognition items like gas cards, theatre tickets, and other special treats for volunteers.
- A Program Development Team was recruited and is investigating and mapping citywide senior program availability.
- A new Volunteer Office includes three work stations and conference area for use by Project Consultants and Teams.

Keys to success

- Provide regular oral reports by project team members to linked organizational managers to obtain feedback and direction for teams, and include project consultants in staff and project planning meetings.
- Provide reports to organizational governance committee leaders (board and board committees).
- Match existing volunteer staff to new leadership opportunities based on an assessment of their KSA.
- Partner with community organizations, such as the RSVP of Dane County and the Dane County United Way, to deliver a community forum on "Volunteers, the Next Generation. Engaging Boomers in Community Service; National and Local Perspectives."
- Use focus groups composed of the target population (professionals 50-65 years old) to identify appropriate venues and media for recruitment, and to develop a language designed to attract this population.
- Contact individuals directly and personally to invite them to participate in "significant service opportunities in a downtown organization."
- Create position descriptions and team project descriptions to provide clear parameters for the work of individuals and for the charge to teams.
- Use an Organizational Development professional to prepare teams for their work together and recruit a professional volunteer to continue this role.

New volunteer roles created and skills/experience utilized

Senior Project consultants and committee members with public relations, communications, organizational, and management skills

NORC Leadership Project Jewish Federation Of St. Louis, Missouri

Organizational Mission of NORC

To support the healthy aging of adults in their own homes by providing opportunities for meaningful community involvement and increased access to support services.

Description of NORC's Model of Significant Service

The Leadership Link model is a strategic plan that will sustain the Jewish Federation of St. Louis' Naturally Occurring Retirement Community (NORC) project. Older adult professional volunteers include members of two new professional volunteer teams—the Significant Service Advisory Committee and the Leadership Council—and a Project Coordinator (Year 2). After receiving education about the Project, volunteers collaborate with the professional staff to develop policies for recruiting other professional volunteers; plan membership and resident-driven programming; identify creative funding mechanisms; and forge creative partnerships with local corporations, businesses, and the Service Corps of Retired Executives.

Organizational structure and coordination

The Project Coordinator supervises the Leadership Council with advice from Significant Service Advisory Committee members and reports to the NORC manager.

Major accomplishments realized during two-year period

- NORC residents assumed new type of volunteer roles for professional level functions, including strategic planning, marketing, organizing group tasks, outreach and teaching.
- Established sources of volunteers in new partnerships with SCORE, Washington University School of Business, and Washington University Community Service Office.
- Created key documents that other NORCs may use to replicate the NORC Leadership Link Model, including Ambassador Resource Book, Adviser Resource Book, and Leadership Link Project Coordinator Resource Book.

“When I retired (18 years ago) I was very concerned about finding ways to keep active and happy. Volunteering for NORC is one of the ways that I have found to help me do this. I have several other volunteer “jobs” and now find that I am working between 50 and 60 hours a week and enjoying my life immensely. [For the NORC project], I helped develop an educational program for people facing the transition from an active working life to retirement.”

—SCORE Volunteer

“I learned a lot about working together as a team, leadership, organizing gatherings, etc. A bonus was meeting so many others with the same goals and learning so much. So many think once you turn 55 years old, you are going downhill after that. To the contrary, it has been proven that volunteering can keep one young and healthy with a positive attitude.”

—NORC Resident Volunteer

Keys to success

- Identify the right venue and approach for attracting reluctant volunteers who are uncertain of their interest and/or qualifications.
- To enhance the perceived importance of the project, hold a group discussion with potential volunteers to provide an opportunity for a critical mass to gather and share their views as ‘consultants’.
- Demonstrate appreciation for any volunteer efforts through thanks and telling stories within meetings that show recognition of volunteers’ efforts and progress.
- Document and share volunteer successes in written articles or documents.
- Periodically remind volunteers of goals and raise discussion about indicators that goals are being achieved.

New volunteer roles created and skills/experience utilized

The Leadership Project creates 18-20 new volunteer roles for a project coordinator, leadership council members, and significant service advisory committee members with experience and skills in business management, financial analysis, marketing, nonprofit management.

Capacity Corps Model Southern Maine Agency on Aging Scarborough, Maine

“I would emphasize the value of the different perspectives that can be obtained from leadership volunteers. With just a small amount of invested time, a nonprofit leader can gain a lot of useful opinions from volunteers. The other obvious benefit is that when a volunteer is engaged in helping a nonprofit, he or she is often disposed to contribute to the financial well being of the organization as well.”

—Capacity Corps Volunteer

Organizational Mission of Southern Maine Agency on Aging

To ensure that older people living in southern Maine, especially those who are frail, living alone, or have low incomes, received the support necessary to maintain their independence in the community.

Description of SMAA’s Model of Significant Service

The Southern Maine Agency on Aging (SMAA) model develops and demonstrates a Capacity Corps model within its RSVP program for utilizing leadership and professional level volunteers ages 55+ to build organizational capacity and enhance results in non-profit organizations. Initially, SMAA develops roles for volunteers with superior skill sets to supplement and support key staff within the Agency to test the model. These volunteers then help SMAA within the areas of strategic planning, branding and marketing for key SMAA programs, and income generation potential within existing, revamped or potential new programs. SMAA

“SMAA was seeing a decline in the number of participants in the Meals on Wheels program at a time when the aging population was increasing. I was asked to determine the reasons for this and to propose some solutions to the problem. I interviewed a number of health care professionals in the Portland area, participants in Meals on Wheels, Meals on Wheels volunteers and employees. I assessed all available SMAA data and examined practices of other large Meals on Wheels programs around the United States. I developed a draft marketing plan that identified the problems and possible solutions. The draft was presented across the SMAA organization. Further implementation planning will be done when SMAA moves to a new frozen food distribution model.”

—Capacity Corps Volunteer

will produce a replication report and tool kit to facilitate recreation of the SMAA Capacity Corps model at other RSVP programs nationally.

Organizational structure and coordination

The Capacity Corps project is supervised by SMAA’s RSVP Director who is assisted by a part-time coordinator and members of Capacity Corps Steering Committee.

Major accomplishments realized during two-year period

- Completed a replication guide with recommendations for program development, outreach and recruitment activity, and volunteer achievements for other nonprofits to use.
- Developed a new marketing plan for SMAA’s Nutrition Program, an accounting manual to explain SMAA’s funding sources, and a new strategic plan for the Agency.
- Recruited a core group of Capacity Corps volunteers who can function as strong advocates for SMAA.

Keys to success

- Network with a group of individuals interested in seniors, nonprofits, volunteerism and civic engagement, such as our Steering Committee, to spread the word about the project and build credibility.
- When recruiting, use different messages and modify when needed, Immediately follow-up on all inquiries
- Be as flexible as possible on service possibilities in order to accommodate and use the talents of potential volunteers.
- Provide an orientation to the agency so volunteers can see how their service fits into the larger picture and makes a difference

New volunteer roles created and skills/experience utilized

The original plan was to recruit Capacity Corps members in four areas: Strategic Planning, Marketing, Financial/Business Planning, and Research/Applied Technology. Volunteers were recruited in all these areas except Research/Applied Technology. In addition, volunteers were recruited in Emergency Planning and Development.

ExcelleShare Model

Center For Excellence In Aging Services

State University Of New York

Albany, New York

Organizational Mission of Center for Excellence in Aging Services

The Center for Excellence in Aging Services is a translational research center that develops, tests and implements innovative practices and policies that address the needs of aging persons, their families, and caregivers. The Center's diverse research, training, education, planning and service activities synergistically work to improve the creation, delivery and sustainability of evidence based approaches to addressing key aging concerns for the years ahead.

“You have an opportunity to use your rare skills to keep contributing to the community, by increasing the capacity of organizations to provide critical services to the most vulnerable individuals in your community. You will be helping the nation become a more caring society, as you will be leading by example. You will also have an opportunity to engage in life-long learning in the process.”

—A Volunteer

The Center stands at the nexus between universities and communities determined both to create new knowledge and to be a key partner in translating existing knowledge into practice. The Center's success in these endeavors is enhanced by maintaining relevance in its activities, finding low cost successful strategies to address key concerns, and expanding its connectedness to various constituencies.

Description of the Center's Model of Significant Service

The Research Foundation's Center for Excellence in Aging Services (CEAS) ExcelleShare Model establishes an eight member Vision Council to serve as a conduit for volunteers into CEAS, its service components OASIS and RSVP, and throughout the local community. Headed by a stipended volunteer Council Executive, the group guides overall development and implementation of reinventing retirement initiatives that seek to engage older adults, identify key areas for leadership and other skilled areas, recruit volunteers, and provide training and mentoring to assure the highest quality volunteer experience. The Council targets experienced 55+ volunteers to serve as ExcelleShare Mentors, Trainers, Ambassadors, Marketing Specialists, Information Specialists, Evaluators, Capacity Builders, Ombudsmen, and Financial Professionals in CEAS and various community agencies.

Organizational structure and coordination

The project director reports to Director of CEAS management team Vision Council headed by Executive oversees development of training for reinventing retirement initiatives throughout community. ExcelleShare and CEAS subscribe to an integrated and collaborative model of capacity building.

My accomplishments as a leadership volunteer include:

- *The development and piloting of a needs assessment tool that can be used by non-profit organizations to assess their organizational needs and how leadership volunteers might help them in fulfilling those needs.*
- *Facilitating an ExcelleShare conference with non-profit organizations using the needs assessment tool.*
- *Writing an article on leadership volunteers.*

—A Volunteer

Major accomplishments realized during two-year period

- Achieved full integration of the Vision Council (VC) with members serving multiple roles within the Center and working toward expanding the use of leadership volunteers in CEAS service programs.
- Developed an organization-wide strategy for the recruitment, orientation, deployment, and training of leadership volunteers.
- Conducted several outreach events to build the capacity of local organizations to incorporate leadership volunteers and is transitioning ExcelleShare to serve as the core of a Civic Engagement Resource Center to coordinate CEAS community outreach projects in the local area.

Keys to success

- Ensure that management and staff treat leadership volunteers as equal partners and are willing to allow volunteers to work within service programs to incubate the development and testing of tools for use in other non-for-profit agencies.
- Develop meaningful roles for volunteers to do as soon as possible after recruiting and match individual to appropriate, well-defined role.
- Create a guide for on-boarding, orientation and training for volunteers, using a multi-media approach.
- Establish a practice model that encourages peer to peer orientation and training.

New volunteer roles created and skills/experience utilized

Created roles for vision council executive, counselors, trainers, community ambassadors, marketing specialists, information specialists, evaluators, financial professionals, and development officers. Skills required include communications, training, marketing, writing, computer operations, evaluation, advocacy, budgeting, fundraising, and financial analysis.

What can a leadership volunteer do for a nonprofit?

- A leadership volunteer can provide you with important professional and consultative services that you might not otherwise be able to afford.
- Leadership volunteers can assist you in taking a new and re-invigorated look at your organization and find ways of recalibrating vision, mission and goals and improving processes and services.
- Whatever project the leadership volunteer is working on for you, you must remember that you are the one who owns the project and its results. The leadership volunteer is there for one purpose only — to serve your needs.

Friends of Science and Technology Education Arizona Science Center Phoenix, Arizona

“A lot of organizations see their volunteers as adjuncts to their organization rather than being part of the hierarchy on the organizational chart. Here, we’re part of the staff and have shown that we can do amazing things for them.”

—A Volunteer

“When I talk to friends who are in my age range about the Science Center, they look at me and say, “Wow! It sounds like you’re having a blast.” It’s challenging and is helping the community. I have pulled several friends in who weren’t volunteering before.”

—A Volunteer

Organizational Mission of Arizona Science Center

The Science Center’s organizational mission is to inspire, educate and entertain people about science.

Description of the Science Center’s Model of Significant Service

Arizona Science Center’s Friends of Science and Technology Education (FOSTE) program engages adults 55+ with backgrounds in teaching science, technology, engineering and math to develop and present hands-on activities at the Center. FOSTE provide important activities that greatly enhance the Center’s educational value for visitors, staff and other volunteers. They act as a resource for researching exhibit and program content, provide unique, hands-on experiences and presentations for visitors; and receive the satisfaction of knowing that they can help Center staff inspire the next generation of teachers, scientists and engineers. The FOSTE Council develops strategies to recruit, train and engage volunteers, and members produce a large collection of visit-enhancing activities.

Organizational structure and coordination

FOSTE volunteers are managed by the Center’s volunteer coordinator and professional education staff. Volunteers work with education staff to create activities and to design and deliver training for new volunteers.

Major accomplishments realized during two-year period

- Recruited nineteen (19) 50+ volunteers with backgrounds in science, technology, engineering, and math to enrich the learning environment at the Science Center.
- Developed new, hands-on permanent and rotating exhibits for student and adult visitors.
- Implemented a volunteer-led training program for new volunteers

Keys to success

- Used low-cost solutions to promote the FOSTE program, such as word-of-mouth promotion by FOSTE volunteers and staff, VolunteerMatch website, volunteer fairs, and flyers to organizations that work directly with and provide services to people ages 55 and older

“Each of us comes with a high level of skill and experience, but we continue to learn from each other. It replaces what I used to get at work. When you work in an engineering environment, there are many people around you, and you learn from them. Now I can get that from these folks.”

—A Volunteer

- Solicited and implemented feedback from FOSTE volunteers about critical factors for program success. Recommendations included:
 - a professional, experienced volunteer coordinator who takes the lead in recruiting
 - recruiting from within our volunteer base and through their referrals
 - emphasizing our diverse group of volunteers and the social aspect of volunteering
 - support from senior management
- Recognized and acknowledged the significant contributions of the FOSTE volunteers by inviting them to participate in VIP events where their activities were showcased.

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in teaching, STEM fields, and public relations.

Nurse-Mentor Volunteer Model Hacienda Healthcare Phoenix, Arizona

“I’m not afraid of all the tubes and the medical difficulties. I can pick my hours, pick up the babies, play with them, and rock them to sleep. It is such a blessing to me.”

—A Volunteer

Organizational Mission of Hacienda Healthcare

To provide specialized services for medically fragile and chronically ill infants, children and young adults in Arizona.

Description of Hacienda’s Model of Significant Service

Hacienda HealthCare’s Nurse-Mentor Volunteer Model, reportedly the first of its kind in the nation, recruits and uses 55+ retired RNs as mentors to new nursing graduates recently hired by Hacienda HealthCare. The Nurse-Mentor Model is an innovative approach to addressing the nursing shortage currently being felt throughout Arizona that impacts the quantity and quality of nurses Hacienda HealthCare is able to hire. A registered nurse, aged 55 years or older, will serve as a Nurse-Mentor Volunteer Manager to the cadre of 55+ retired RNs who will in turn mentor the new nursing graduates. This is in addition to the hands-on training new nurses receive from the experienced Hacienda nursing staff. This program enhances the level of care new nurses provide their patients—chronically ill infants, children and adolescents.

“During the day there is often no one there except for the staff nurses, and when you are taking care of more than one infant, you can’t rock each of the babies for the 15 or 20 minutes as a mother would. But the volunteers have the time to give that human contact.”

—Nursing Manager

Organizational structure and coordination

The Nurse-Mentor Volunteer Manager, who reports to the Director of Education, recruits and manages the 55+ volunteer mentors.

Major accomplishments realized during two-year period

- Recruited retired nurses and teachers to serve as mentors for new nurses at Hacienda hospitals
- Developed on-going training program for the mentors and new nurses
- Increased specialized services offered to medically fragile patients and their families

Keys to success

- Partnered with other organizations to recruit and place professional and leadership volunteers.
- Emphasized the organization’s mission to attract and retain volunteers.
- Used a one-on-one approach to training individual or small groups of volunteers to cultivate a deeper, more meaningful relationship with volunteers.

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in organizational development, customer service, communications, presentations, advanced nursing skills/knowledge, coaching/mentoring, and computers.

Big Experience Project Big Brothers Big Sisters of Central Arizona Phoenix, Arizona

Organizational Mission of BBBS

To help children realize their potential through professionally supported one-to-one relationships with volunteers who care about them.

Description of BBBS’s Model of Significant Service

The Big Experience Project increases the agency’s capacity to provide more mentors for children by creating new positions that utilize the skills of older adult volunteers in administering its Site-Based mentoring program at schools and forming new partnerships with local businesses. Older adult volunteers are recruited by connecting with the retiree associations of

“We decided that we needed to make the Big Experience happen to maintain what we had and to prepare for the future. We can have just one professional staff member overseeing five schools if we can count on volunteers to manage day-to-day.”

—A Manager

“I like feeling part of something bigger. I have spent hours doing research. There are a lot of people trying to do the same things we are doing with people 55 and older. We are changing, the world is changing.”

—A Volunteer

local corporations. This has the added benefit of keeping local businesses engaged with BBBSAZ through an avenue that has not been explored previously. These volunteers take on the role of Site-Based Specialists and are assigned to a school in which they are responsible for enrolling children and mentors, matching children to appropriate role models, and monitoring the match. Additionally, these volunteers take on the role of Community Relations Managers to present the agency’s story and generate partnerships that will provide access to new volunteer mentors, as well as potential financial support.

Organizational structure and coordination

The site-based specialists and community relations managers function like staff persons and report to a BBBSAZ Director.

Major accomplishments realized during two-year period

- Created program staffed by leadership volunteers to expand the site-based programs in schools offered by BBBS
- Increased number of mentors and students being served by Big Brothers and Big Sisters

Keys to success

- Revised original expectations of BELs volunteers to match the volunteers’ actual time and commitment expectations.
- Worked to develop acceptance by senior management of the BELs volunteers’ contributions and to integrate the volunteers into the on-going work of the organization.
- Used current volunteers to do word-of-mouth recruiting for the program.

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in youth work, training, marketing, coaching/mentoring, and organizational development.

The Partnership Committee Mesa United Way Mesa, Arizona

“It changed us far faster and far differently than we could have imagined. We recruited well-connected retirees to give the program clout and help with community partnerships. Our recruits included a former city manager, an Arizona State University provost, the director of a large senior center, and the head of the Arizona Bar Association Foundation.”

—Committee Chair Volunteer

Organizational Mission of Mesa United Way

To serve as a primary vehicle through which the citizens of Mesa create positive change in their community.

Description of Mesa United Way’s Model of Significant Service

Mesa United Way Model establishes a Partnership Committee comprised of adults 55+ who have held positions of leadership or service with other community service agencies in Mesa. These Committee members develop methods to identify potential organizational partnerships and individual donors in the community that can directly address community needs and conditions, augment United Way’s existing fund development efforts, and become a clearinghouse for community change. The Partnership Committee allows the agency to maintain contact with former donors and to reach out to the older adult community as individuals. The Partnership Committee members are an “Emeritus Board” to the Mesa United Way Board, providing detail on community indicators, identifying what organizations in the community can address positive change to these indicators, and offering recommendations on how to use the 55+ citizens to create the capacity for change. The use of 55+ citizens to populate the Partnership Committee retains their expertise and service to the benefit of the community and leverages that service to affect immediate results.

Organizational structure and coordination

Volunteers report to the Volunteer Chairman of a standing United Way Committee.

Major accomplishments realized during two-year period

- Recruited professional 55+ volunteers to provide additional services to 17 local agencies needing extra help
- Offered tax preparation and pharmacy discount programs to hundreds of Mesa families
- Created a cultural change within United Way that has potential to be a national model

Keys to success

- Developed clear and detailed job descriptions for the volunteer positions that doubled as marketing/recruiting tools.
- Adopted the “skills based volunteering” approach to matching volunteers to appropriate assignments.
- Accorded the volunteers the same consideration as is given to staff, including a job description and title, a place in the organizational chart, business cards, a name badge, a dedicated place to work with appropriate supplies, and staff orientation

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in management, recruitment, evaluation, and research.

Volunteer Leadership Teams The Centers for Habilitation Tempe, Arizona

Organizational Mission of The Centers for Habilitation

To provide a broad range of services to persons of all ages with disabilities to enable them to live as self-directed, purposeful and rewarding lives as possible.

Description of TCH’s Model of Significant Service

The Model developed by the Centers for Habilitation (TCH) creates teams of volunteers to contribute to TCH employee development and to TCH service recipients’ quality of life. Professionals 55+ are organized into self-guided teams assuming roles as Career Development Mentors and Culinary Specialists, thus alleviating additional administrative duties for TCH staff implementing this program. Career Development Mentors are individuals with diverse professional backgrounds and interests who work with “mentees” to help them achieve career goals. Culinary Specialists serve as menu planners and creative food prep trainers for staff in TCH group homes, enhancing the food quality and nutrition for residents of each home.

Organizational structure and coordination

The Development Department, Human Resources, and the Director of Operations play key roles in the coordination of the volunteer leadership teams. Responsibilities for recruitment, training, retention and direction are shared among departments.

“Some organizations won’t take you if you want to volunteer on a higher level. You have to be able to show them that you aren’t going to be a problem. If you draw people from corporate jobs who are extremely confident types, they might feel they have creative license to do what they want. Organizations have to be clear to them about the boundaries. I’m willing to play by the rules, but I want flexibility.”

—A Volunteer

Major accomplishments realized during two-year period

- Recruited professional volunteers with culinary and meal planning experience
- Improved quality of life for residents in 25 small group homes by providing more nutritious meals

Keys to success

- Developed clear, concise marketing tools that described expectations of the volunteer and the agency’s mission.
- Maintained regular and consistent communication with the volunteers to ensure that they understood their assignments, and that the agency’s expectations matched the individual’s skills and needs.
- Offered various kinds of recognition for the volunteers’ contributions.

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in career planning, mentoring, menu planning, food preparation, food safety, and nutrition.

The Tempe Connections Talent Connection Friends of the Tempe Library Tempe, Arizona

“One of my quests after retiring was to keep learning. I figured I’d spend more time at the library reading, but this is a lot better. I hear so many stories about people who retire and go into a hole. I didn’t want that.”

—A Volunteer

Organizational Mission of Friends of Tempe Library

To provide adults with opportunities to discover new purpose through access to a wide range of learning programs, supportive planning for life changes, encore work options, and volunteer participation.

Description of Friends of Tempe Library’s Model of Significant Service

The Tempe Connections model utilizes the talent and experience of 50+ adults and connects them to programs, opportunities and services they want and need; offers individuals renewal and enrichment activities; and provides opportunities for meaningful involvement in the community. The Talent Connection has three purposes:

1) Outreach and education – Raises awareness among City of Tempe departments and select non-profit agencies about the value of experienced retired and older adults in work that fulfills community needs in the areas of education, health and social services.

“At first, city officials seemed to get the concept, but they kept coming up with more places to put volunteers that didn’t fit our criteria. Even after meeting with department heads it was hard to crack institutional thinking. Parks and Recreation said they could use a botanist, but what they really wanted was a person to trim trees. So we had to turn the program inward.”

—A Program Director

2) Identify positions and/or projects - Assists City departments and select non-profit agencies to identify higher level volunteer and paid positions and/or projects that utilize the skills and experience of older workers.

3) Recruit skilled adults - Finds older adults interested in new service opportunities, part-time or flexible employment, or one-time or short-term projects, and connects them with identified positions and/or projects

Organizational structure and coordination

Volunteers report to Director of Tempe Connections or to individual department managers where they are placed.

Major accomplishments realized during two-year period

- Matched 21 leadership volunteers with projects requiring their skills and experience
- Introduced concept of using leadership volunteers to managers within the City of Tempe

Keys to success

- Established the Volunteer Engagement Task Force as the first step for recruiting and staffing key leadership volunteers.
- Fostered an on-going volunteer cultivation (recruiting) and networking effort spearheaded by the Task Force members.
- Developed written position descriptions for the volunteer roles.

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in communications, human resources, supervision, marketing, computers, and management.

New Volunteer Leadership Structure Duet (formerly Beatitudes Center DOAR) Phoenix, Arizona

Organizational Mission of Duet

To promote health and well-being through a broad range of services to homebound adults, caregivers, faith communities, and grandparents raising grandchildren.

“I like to do things that aren’t necessarily easy, and this [workshops for underserved gay and lesbian couples] hasn’t been an easy project. We are forging new ground. Many elderly people in the gay community don’t really want to be identified, but those in their 60s and younger are interested in looking at their own long-term care options.”

—A Volunteer

“The leadership program attracts a different type of volunteer—not the warm fuzzy types who think sitting with a grandma is the greatest thing that could ever happen to them, but those who really care about the community, who understand the needs and want to do something about them. It can bring people who have the skills to help strengthen a charity in big picture, longer-term ways that the charity hasn’t had the time and talent to address before.”

—A Duet Manager

Description of Duet’s Model of Significant Service

The Model of Significant Service increases Duet’s effectiveness by developing a new model to engage talented older adults in leadership roles that span our organization’s infrastructure. These roles strengthen our organizational capacity by bringing in more corporate and congregational partners, financial support, and direct service volunteers. The model incorporates a two-prong approach. Our Outreach Coordinator focuses on recruiting a team of Outreach Liaisons. Following extensive training, the new cohort of leaders involves additional partners in service. An “engagement ladder”, the second component of the two-prong approach, uses technology developed through the grant to involve many more volunteers in our organization’s traditional service roles. Two 55+ volunteer mentors describe the various leadership roles that exist and promote the involvement of newly-recruited 55+ volunteers. These roles include: Outreach Liaisons; Home Repair Coordinator; Volunteer Mentors; Training Facilitators; Corporate Sponsorship Allies; and Endowment-Building Champions. The initiative allows our community-based, interfaith organization to serve greater numbers of homebound adults, family caregivers, grandparents raising grandchildren, and congregational health programs.

Organizational structure and coordination

The Outreach Coordinator and the Director of Volunteer Services coordinate the recruiting, training, and management of the professional volunteers.

Major accomplishments realized during two-year period

- Recruited 20 professional volunteers to expand Duet’s outreach in the community
- Used the new volunteers to create additional services for Duet’s target populations.
- Implemented an interactive, geographically-specific map to pair potential volunteers with individuals requesting services.

Keys to success

- Recruited through word-of-mouth at special activities and events, and through focus groups in which participants, who were part of the target volunteer population, helped to devise marketing activities.
- Provided timely follow-up on inquiries about volunteer opportunities and matched new volunteers with appropriate roles as quickly as possible.
- Included ongoing mentoring and regular informal opportunities to elicit feedback from the new volunteers regarding their experiences.

- Encouraged leadership volunteers to develop their own plans on how they carry out and accomplish their project or assignment.

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in communications, community networking, organizational development, telephone, home maintenance, presentations, and planned giving.

The Ubuntu Project City of Mesa Arts and Culture Mesa, Arizona

“Our Ability Experts have had an incredible impact upon all three of the Mesa arts and cultural organizations as part of the Ubuntu project. The Arizona Museum of Youth now has a new website, the Arizona Museum of Natural History has a team of trained volunteers conducting program surveys, and the Mesa Arts Center understands the steps it needs to take to garner a Gen Y audience.”

—Museum Director

Organizational Mission of City of Mesa Arts and Culture

To provide education, cultural enrichment, civic pride, and civic investment to the citizens of the City of Mesa.

Description of City of Mesa Arts and Culture’s Model of Significant Service

The Arizona Museum for Youth, the Mesa Arts Center, and the Mesa Southwest Museum, are the three organizations falling under the City of Mesa’s Arts and Culture Department. The Ubuntu Project allows these arts and culture venues to act as benign catalysts for interaction with the community by including and listening to those leaders whose interest is in promoting the “cooperative spirit”.

This model is based on a volunteer, three-person Ability Expert team that acts as a “Brain Trust” to the leadership of the three organizations. Under the leadership of the Ability Experts, the project develops each institution’s potential to integrate diversity into board management and affiliation, volunteer opportunities, and staff, as well as into educational opportunities that maximize the impact of programs and services. The vision is to move toward meaningful and integral change to include commonalities, and away from “just presenting or doing something for an identified group.” The goals of this project are threefold: seek to increase Arts and Culture leadership’s accessibility to an executive level “Brain Trust” reflecting the community’s diversity; grow project-based volunteer positions by 50 in order to implement six institutional diversity projects identified by the Ability Expert volunteers; and enhance diversity in patron participation by 20%.

Organizational structure and coordination

Volunteers report to the directors of the three museums and to the Director of the City of Mesa Arts and Culture Department.

Major accomplishments realized during two-year period

- Recruited three Ability Experts to improve websites, evaluate programs, and sharpen marketing plans for the City's museums

Keys to success

- Prepared for the volunteers by providing work space, computer, access to network drives, telephone, and other supplies to ensure volunteers had the tools necessary to complete their tasks.
- Assigned individual staff members to help volunteers learn procedures and familiarize themselves with departmental protocol.
- Allowed volunteers to assume leadership roles in conducting their own meetings and setting project goals for themselves;

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in organizational leadership, creativity, and project-specific skills.

Supervised Volunteer/Leader Team Banner Health Systems Sun City, Arizona

"I sought out nursing and clinical senior managers to solve patient problems. The first couple of times I got these looks—like who are you and what do you want?—but now they are warm and open, and they help me get the answers I need for my patients."

—A Volunteer

Organizational Mission of Banner Health System

To make a difference in people's lives through excellent patient care.

Description of Banner Health System's Model of Significant Service

Banner Health's Model initiates a new effort to reach the pre- and new-retirees in the greater West Valley area. This model explores and pursues new and innovative avenues in volunteering, and also builds the capacity of community volunteering, by expanding volunteer recruitment activities to include an electronic format, placing recruitment kiosks in the community, and recruiting from local employers for professional and soon-to-be retired volunteers. Based on learning from extensive outreach to potential baby boomer volunteers, making substantial changes in the type and quality of volunteer assignments, and expanding their internal volunteer leadership program, this model enables Banner Health to explore and pursue

“Many of the older generation tend to volunteer for social reasons—to be part of a community and to give back. We want that, too, but we want more than just being there. We want to be engaged.”

—A Volunteer

new avenues in volunteering. It also builds the capacity of community volunteering by applying funds to new volunteer recruitment and retention and leadership development programs.

Organizational structure and coordination

Volunteer Leaders assist staff throughout the hospital and are responsible for recruiting, training and mentoring other volunteers. These Leaders report to the Volunteer Services Strategic Planning Committee which includes a diverse representation of existing volunteers.

Major accomplishments realized during two-year period

- Recruited 150 professional volunteers who serve as coaches to patients in physical therapy, interview new volunteer prospects, and enhance the services provided to patients.

Role played by one Banner professional volunteer: One volunteer recruited by Banner works as a “broker” to bring together professional volunteers and managers. An obstacle many nonprofits face when deciding to use volunteers in professional and leadership is acceptance of these volunteers by staff members. Banner’s volunteer is helping to overcome this barrier by three levels of involvement at the hospital. First, she talks with staff members, volunteers, and visitors to find out what additional services are needed and then helps to define what volunteers can do to provide these services. Next, she works as a trainer and facilitator with staff to improve their understanding of what professional volunteers can do and how staff can best work with these volunteers. Finally, to complete the circle, she trains volunteers on assuming more responsible roles at the hospital. She brings a wealth of experience in organizational development at the corporate level to her work at the Banner hospital and appreciates the fact that the hospital managers view her as “...a member of their organization’s inner circle.”

- Created a video play “A Day without Volunteers” to communicate the importance of the leadership volunteer roles to staff and managers.

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in communications, human resources, marketing, computers, and management.

The P.E.E.R.+ Program Interfaith Community Care Surprise, Arizona

“Many baby boomer retirees want to use the leadership skills they developed during long working careers. In addition to the new bookstore and catering service, volunteers are increasingly driving other long-standing programs and events. Our gala, our golf tournament, a holiday family event, are all being created, developed, and staffed by volunteers.”

—A Vice President

Organizational Mission of Interfaith Community Care

To provide the highest quality of personalized care, social and educational services.

Description of Interfaith Community Care’s Model of Significant Service

Interfaith Community’s new Helen and John M. Jacobs Independence Plaza, adjacent to the Rio Salado Community College, includes a unique Social Center/Café with improved community resources and opportunities for successful aging. The P.E.E.R.+ Program (Purposeful Enterprise – Empowering Retirees) assists Interfaith in developing a business plan for the three social enterprises within the Café and Nutrition Center. The P.E.E.R.+ Outreach Managers recruit and utilize 55+ Boomers with skills related to catering/event planning, marketing, sales and early child development to work at the Café, Book Store and Child Development Center.

Organizational structure and coordination

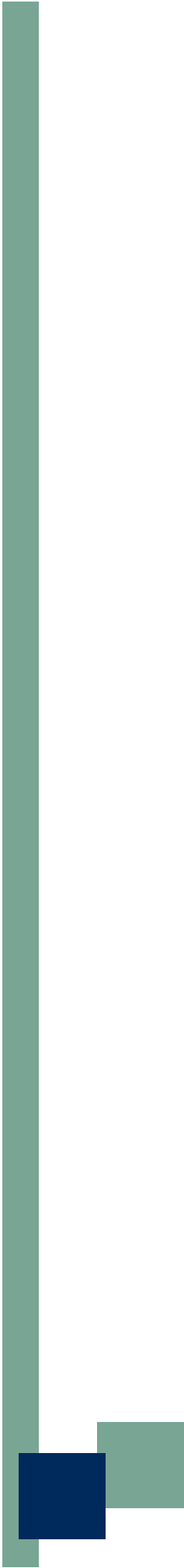
Volunteers report to managers of functional areas in which they work, and the Vice President of Interfaith has oversight of the project.

Major accomplishments realized during two-year period

- Recruited 31 leadership volunteers to launch three new social enterprises.
- Offered new and challenging opportunities for retired professionals in bookstore management, café management, and child development center.
- Opened new Café and Nutrition Center with volunteer assistance.

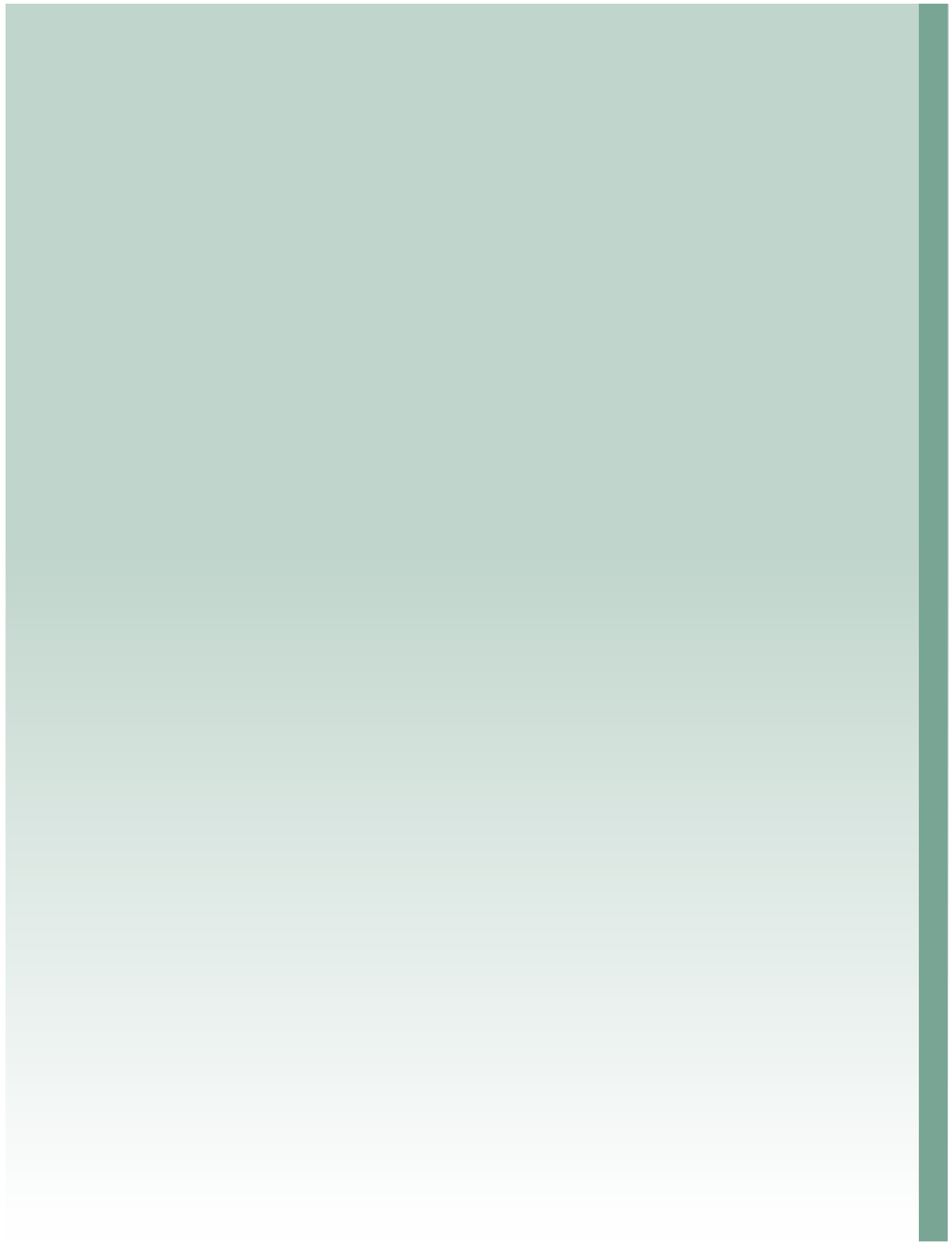
Keys to success

- Developed on-going partnerships with other nonprofits, government agencies, and educational institutions as part of the recruiting and staffing aspect of the program.
- “Staffed” the volunteer department with leadership volunteers who assist fulltime staff with orientation, trainings, recruitment, retention and recognition.

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- Encouraged additional training for volunteers so they can learn new skills and use these enhanced skills to help in projects.

New volunteer roles created and skills/experience utilized

Creates volunteer roles for individuals with experience in strategic planning, bookstore management, food preparation and supervision, child development.





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