

# Boomers and Babies: Engaging Boomer-age Volunteers in Oregon's System of Early Care and Education



prepared for:



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# Boomers as Volunteers in Early Childhood

## Introduction

This report identifies opportunities and constraints to engage older adults, specifically Baby Boomers (aged 55-65) in meaningful work (as volunteers or employees) to improve Oregon's system of early childhood education and care. As requested by the Oregon Community Foundation, a team of Oregon State University researchers<sup>1</sup> conducted multiple focus groups and key informant interviews to examine three key questions related to five areas of interest to the Foundation (parenting supports, early literacy, work force, advocacy, and early childhood facility infrastructure).

**... multiple focus groups and key informant interviews...**

The three key questions examined were:

1. *What would make work in these areas of interest attractive or unattractive?*
2. *What barriers exist to participation and most importantly how might these barriers be addressed?*
3. *What structures and incentives would make this work most attractive and meaningful?*

## Brief Background on Boomers as Volunteers in Public Service

In December of 2005, at the White House Conference on Aging, the Corporation for National and Community Service (CNCS)<sup>2</sup> kicked off its *Get Involved* promotional campaign to help convince 77 million boomers to meet community needs through volunteer service. At that time, 33.2% of all boomers (25.8 million people) had volunteered for formal organizations during 2005, representing the highest rate of volunteering of any age group. The belief then was that as boomers begin to retire and have more free time, this percentage would only increase. It is predicted that by 2020, boomers will increase the level of volunteering by older adults by 50 percent -- doubling the number of older adult volunteers by the year 2036.

Two years later in March of 2007, the CNCS released a report with valuable findings<sup>3</sup>, some of which are highlighted here.

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<sup>1</sup> Eight OSU faculty members, including three county Extension faculty members, worked with four doctoral students to complete this project. Special recognition for their contributions goes to the graduate students who completed and transcribed most of the interviews: Molly Trauten, Brandi Hall, Doris Cancel-Tirado and Rica Amity. We also acknowledge the great responsiveness and support of the OSU Extension county faculty: Fern Wilcox (Wasco County), Sharon Johnson (Jackson and Josephine Counties), Nina Roll (Lincoln County) and Jeanne Brandt (Washington County). We also thank Maya Burton for her assistance in transcribing interviews. This project was fully the result of this great team.

<sup>2</sup> The [Corporation for National and Community Service](http://www.nationalservice.gov/), an independent federal agency created to connect Americans of all ages and backgrounds with opportunities to volunteer in their communities <http://www.nationalservice.gov/>

<sup>3</sup> [http://www.nationalservice.gov/pdf/07\\_0307\\_boomer\\_report.pdf](http://www.nationalservice.gov/pdf/07_0307_boomer_report.pdf) page 17.

## Boomers as Volunteers in Early Childhood

### **Boomer Volunteers are busy, social, and diverse.**

- Boomer volunteering is highest among those who work part-time. Almost half (46.3%) of all boomers who work part-time also volunteer, compared to one-third (33.7%) of boomers who work full-time and one-quarter (24.3%) of boomers who are either unemployed or not in the labor force. Further, many older workers plan to work at least part-time during their retirement years; most plan to change careers while others hope to continue in the same employment area.
- Nonprofit organizations are well positioned to recruit older workers. Nearly two-thirds of baby boomers say they want to work for a nonprofit or for the government after they retire.
- Baby boomers are less likely to volunteer out of a sense of duty or obligation, and are more likely to volunteer as part of their ongoing social lives.
- The biggest single inducement for boomers to volunteer is when they are asked to do so by someone with whom they have an established relationship.

**Seven out of every ten Boomers who volunteer will continue to volunteer for a year or more; retention is related to both hours of service (more hours leads to greater retention) and to volunteer roles or tasks (higher skill tasks are associated with greater retention).**

- The more often Boomers volunteer, the more likely they are to keep volunteering. Volunteers who serve 12 or more weeks per year have a volunteer retention rate of 79 percent, versus 53 percent for those who serve two or fewer weeks per year.
- Boomers want higher-skill assignments to keep them engaged; the volunteer roles that retain Boomer volunteers for two years or more are professional or management services, and serving as coaches, teachers, tutors or mentors.
- Approximately 75% of boomer volunteers want challenging and stimulating roles, usually reflecting the professional skill sets they bring to the table. Volunteers who are relegated to general labor or who provide transportation services, for example, regularly drop out of volunteering, with only 56 percent who continue to volunteer the following year.

**... roles that best retain Boomer volunteers are most likely to be retained in higher skill assignments - professional or management services and coach, teacher, tutor or mentor....**

**Boomers' relatively high volunteer rate today is tied to their education level and propensity to have children later in life. Previous studies have found that education and still having children at home are two key predictors of volunteer levels.**

## Boomers as Volunteers in Early Childhood

- Today's mid-life adults (age 45-64) are three times more likely to have a four-year college degree than were mid-life adults 15 years ago (29.5 percent compared to 11.5 percent).
- Once their children leave home, Boomers maintain relatively high volunteer rates. This is likely to be because of their higher education levels, their expectations that they will work later in life than previous generations, and their generally good health.

### Empirically Supported Advice to Non-profits Regarding Boomer Volunteers

"The boomer wave signals one of the largest opportunities the nonprofit sector has ever had to expand its pool of resources," said David Eisner, CEO of the CNCS. "Only the nonprofits that retool their ability to engage citizens will reap that reward." Research has identified several principles that can guide non-profits seeking to recruit and retain Boomers as volunteers. These principles include the following:

#### 1. *Cultivate and Develop Boomer Volunteers*

Nonprofits should use charitable and human resources retention models to recruit, cultivate and retain Boomers. In other words: Cultivate volunteers the way you would cultivate a donor and provide professional development just as you do for your staff.

#### 2. *Respect Boomers' Schedules*

Boomers are stretched for time. They are likely to still be working; they are often looking after children as well as helping aging parents; and they love to travel and have many hobbies.

Give them flexible opportunities that include short-term timelines with clear start and finish dates. Consider family volunteer opportunities so that volunteers do not have to choose between volunteering and being with their families. Older Boomers enjoy volunteering alongside their grandchildren.

#### 3. *Treat Boomers as Colleagues*

Don't be alarmed when boomer volunteers resist authority, talk back, or question how things are being done. The ultimate anti-authoritarians, Boomers do not like to be told what to do. Ask and negotiate with them; don't tell them. Make every step of the volunteer process participatory. Take advantage of their intelligence, experience, and education.

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### 4. *Develop Opportunities That Really Matter*

Offer meaningful and challenging volunteer opportunities. Boomers are knowledgeable about social issues, may have strong opinions, and may be experienced social activists. Develop volunteer opportunities that take advantage of their passions and their know-how. Involve them in decision making and goal setting. No envelope stuffing.

### 5. *Remember That Volunteering Is Optional*

Keep in mind that Boomers don't have to volunteer. Their parents may have volunteered because it was what was expected, but Boomers are the ultimate consumers and see volunteering as a way to get their own needs met as well as to provide service to others. Let them tell you what they need; they won't be shy. They may be looking for recognition, friendship, opportunities to be creative, to be in charge of something, to relax, to learn new skills, or to set an example for their grandchildren.

***Boomers volunteer to fulfill their own needs and to provide meaningful service***

### 6. *Be Organized and Professional*

Boomers will not tolerate disorganization, or sloppiness of any kind. They have been working all of their lives, often in positions of responsibility, so they know what works and what doesn't in organizations.

Be clear, be organized, and don't make your boomer volunteers root around for answers to their questions. Assign someone on your staff to be point person. Boomers will not like it if they get a different person every time they call or ask for assistance.

### 7. *Train With Relevance*

Provide training that is relevant, meaningful, and well-presented. Boomers are already highly credentialed and are not looking for more certifications. They want educational training that will help them develop their potential and to perform well -- not training that is all about regulations and control.

Use adult learning models. Treat Boomers as colleagues, not as students. Use discussions, not lectures. Make lessons experiential, not book-based.

***... Offer relevant, meaningful, and well-presented experiential training***

## **Boomers as Volunteers in Early Childhood**

### **8. Reach Boomers through Their Peers and Work**

Appeal to Boomers through their peers. They are much more likely to respond to messages from their peers than celebrities or authority figures. Recruitment materials should focus on other boomer volunteers and their stories and testimonials.

Since most Boomers are still working, try recruiting them at the office. Many employers have programs for their workers, allowing them to use company time to volunteer for select organizations. Work with these companies and their volunteer coordinators. Some non-profits are encouraging their current employees to work beyond retirement by offering reduced hours. Others are recruiting volunteers and part-time workers from among their already retired workers.

### **9. Offer Boomers Relevant Perks**

Money is nice, but Boomers also are attracted by: flexible schedules; job sharing; free training and free use of services; free child care for grandchildren; free use of computers; etc. Some Boomer perks will require changes in policies that may limit benefits or opportunities for part-time employees.

Don't relegate part-time employees to entry-level or non-managerial work, and provide benefits packages that include health insurance and a 401(k) or 403(b) retirement plan. Make this available to both full and part-time workers.

### **Successful Model Boomer Volunteer Programs**

Several programs have been developed to tap the potential of older adults by utilizing Boomers as volunteers and part-time workers. Three models that are particularly relevant to the Foundation's interest are *ReServe*, *Experience Corps*, and *Senior Corps*. Each model is briefly described in Appendix 1.

### **Enhancing early care and education**

Engaging boomers in early care and education has the potential to strengthen this system in numerous ways. There are clear and immediate benefits to increasing the number of Boomer volunteers in early care and education programs. Adult-child ratios will improve and give children more interaction time with adults. Boomers serve as important adult role models who can foster intergenerational relationships, particularly with vulnerable families. The social networks of Boomers offer the possibility of increased advocacy and financial support. If Boomers, as a large and well-educated work force, increase their commitment to early childhood programs, it sends a message about the importance of early care and education to society.

## **Boomers as Volunteers in Early Childhood**

### **Study Design**

This qualitative study used focus group and key informant interviews to assess the potential of engaging Baby Boomers (age range of about 55-65) in meaningful work (as employees or volunteers) to improve Oregon's system of early childhood education and care. Special attention was given to five areas of interest: parenting supports, early literacy, work force, advocacy, and early childhood infrastructure.

### **Sampling Strategy: Focus Groups and Key Informants**

Participants for both the focus groups and key informant interviews were initially identified through the OSU team's existing relationships with members of the early childhood and aging systems in Oregon. For example,

- Denise Rennekamp contacted parenting education and support programs that are part of the Enhancing Skills of Parents (ESPP II) state-wide network.
- Dr. Bobbie Weber, OSU faculty member and director of the Oregon Child Care Research Partnership, facilitated contacts with child care providers.
- Dr. Sally Bowman provided contacts with senior volunteer programs and county Extension faculty in Wasco, Jackson-Josephine, Lincoln, and Washington Counties. These county Extension faculty recruited local participants for the focus groups.

In turn, focus group participants provided some additional contacts for key informant interviews. Additional key informants were identified by the faculty associated with this project. Regional and national programs that promoted intergenerational community service were identified through an extensive search of the web. Identified programs included the Experience Corps, Retired Senior Volunteer Program, Foster Grandparents Program, and ReServe.

Not all of these programs directly addressed early childhood; however, they were included in the study sample because of their potential to provide insights regarding recruitment, placement, and retention of boomer volunteers. Telephone contact was made with directors of the above programs, who were invited to be key informants. They also were asked to identify boomer volunteers who might be willing to be interviewed. In turn, these Boomers were contacted by telephone and invited to participate.

This deliberate procedure resulted in a sample with special knowledge of volunteering in early childhood and/or of volunteer programs for older adults, particularly Boomers. It should be noted that this is not a random sample of older volunteers, Early Childhood directors/staff, or volunteer program directors.



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### Focus Groups

Focus groups were designed to investigate the potential roles that boomer volunteers could play to support young children and their families or early childhood programs. In identifying participants, we specifically targeted volunteers who were Boomers between the ages of 55 and 65. A total of 9 focus groups were conducted with a combined total of 54 participants between June 18 and July 3.

#### *Four Focus Groups with Boomers*

The participants were drawn from communities across Oregon, including:

- Southern Oregon: Grants Pass and Central Point
- Portland metro area: Beaverton
- Coastal Oregon: Coos Bay
- Columbia Gorge: Maupin (Wasco County)

The 25 focus group participants included:

- 22 women and three men.
- All 25 were recent or current volunteers; about half indicated working with children and families. Monthly volunteer hours ranged from 3 or 4 to over 150.
- 18 were retired from occupations including teaching, nursing, social work, business, and government service. Seven of the participants were still working for pay at least part-time.
- 22 of the participants identified themselves as Boomers (aged 55 to 65 years); three participants identified themselves as over 65 but under 70.

#### *Five Focus Groups with Early Childhood Program Staff and Directors*

Five focus groups were conducted with directors or staff members of early childhood programs. All programs had used volunteers in the past and most were currently using volunteers in some capacity. Geographic locations included:

- Southern Oregon: Roseburg (included representatives from all of Douglas County)
- Coastal Oregon: Coos Bay/North Bend; Newport
- Mid-Willamette Valley: Corvallis /Philomath
- North Willamette Valley: Salem (included representatives from Portland, Newburg, Salem)

The 29 Early Childhood focus group participants were all women who represented a diverse group of Early Childhood programs including:

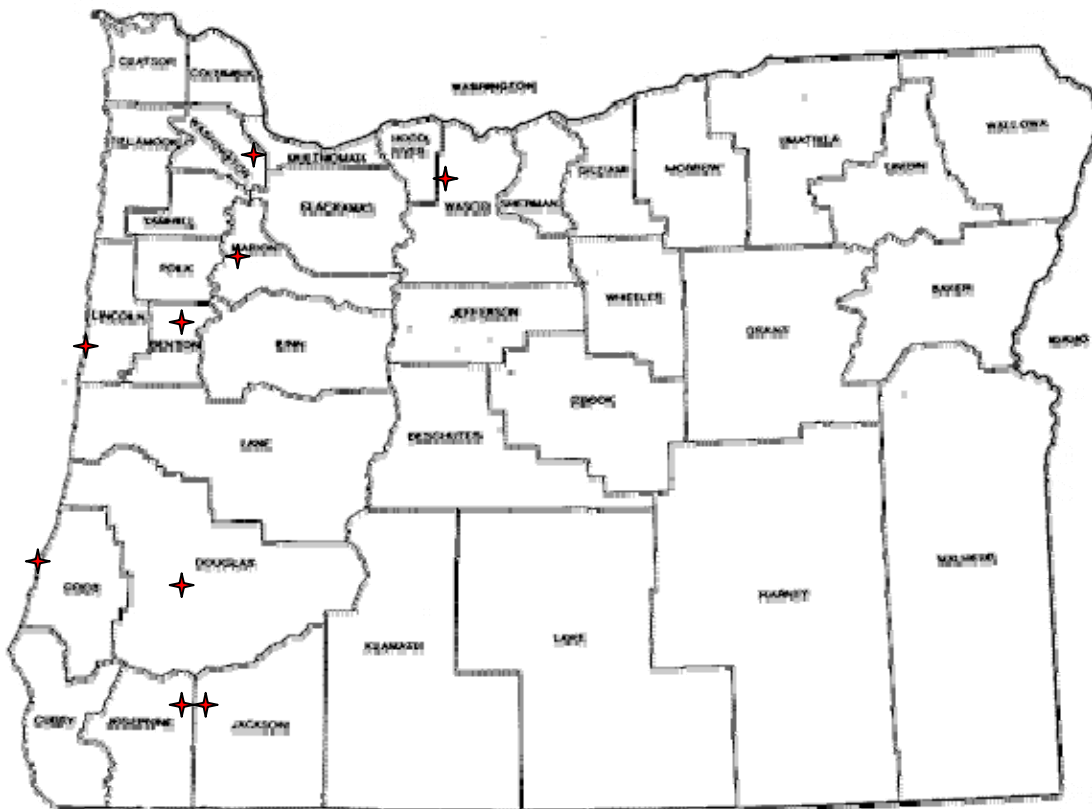
- 12 Child care centers/programs ranging from large corporate-sponsored centers, to mid-sized private preschools, to very small faith-based care

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- centers, and centers operated exclusively for low income families and children (County Housing Authority, Head Start)
- 4 parenting education and support programs including Oregon Healthy Start and Enhancing the Skills of Parents Program II (ESPPII)<sup>4</sup>
  - 4 early literacy programs including Even Start, a two generation program that provides literacy education to low income parents and children as well as parenting education for parents
  - 6 other EC programs and agencies, including an early childhood special education program, an EC counseling services program, and a community action program that provides multiple services to young, low-income families.

Over two-thirds of the EC focus group participants were between the ages of 35 and 54 and had worked in ECE programs for five or more years. The remaining participants were between ages 55 and 65.

Figure 1: Locations of the Focus Groups



<sup>4</sup> ESPPII is funded by The Ford Family Foundation in rural communities in Oregon and Northern California

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### **Key Informant interviews**

Key informant interviews were designed to probe beyond the information available on typical program web-sites to gain “on the ground” insights into program strategies, challenges, and successes, especially those that were most effective with Boomers. A total of 39 key informant interviews were conducted either in person or by telephone with individuals from the following three groups:

- 19 interviews were completed with Boomer age volunteers (during the interview three respondents reported themselves to be between 65 and 70 years old). All respondents were currently engaged in volunteering of some kind, most in ECE settings.
- 11 interviews were completed with directors of adult volunteer placement programs, such as Senior Corps (both RSVP and Foster Grandparents programs), Experience Corps, or other community volunteer programs.
- 9 interviews were conducted with directors or staff of a range of early childhood programs, including child care and preschool facilities, parenting education and support programs (Healthy Start, Parent Enhancement).

### **The Interview Process and Protocols**

Both the focus group and key informant interview protocols were developed to elicit a range of perspectives regarding the Foundation’s interests. The general content and flow of topics in the interviews are summarized in Table 1 (page 11.)

Both the focus groups and the key informant interviews began with an introduction to describe the purpose, assure confidentiality, and briefly review informed consent procedures that had been previously approved by the Oregon State University Institutional Review Board (IRB) for the Protection of Human Subjects.

Participants in focus groups were asked to read and sign an informed consent document prior to beginning the interview. Each participant was offered a copy of the IRB form and given information on how to contact the research team at OSU. Incentives in the form of \$25.00 gas cards were distributed to all eligible participants at the end of the focus group.

For key informant interviews, initial contact was made with potential participants by telephone. During this contact, the project was briefly described and the potential participant was invited to schedule an interview time if he/she was interested in participating. When a potential participant agreed to be interviewed, a subsequent interview time was set and he or she was sent an IRB document prior to the scheduled interview time.

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At the time of the actual interview, the informed consent form was read by the interviewer. Participants were asked to verbally indicate their willingness to participate prior to the beginning of the interview. All participants were later provided (faxed, emailed or mailed) a copy of the IRB document to keep if they wished. When interviews were completed, participants were asked if they were interested in receiving a summary of the final report. If so, their names and addresses were recorded.

### **Transcription, Analysis and Reporting**

Both focus group and key informant interviews were audio recorded and the interviewers took extensive notes. The audiotapes were later transcribed. Transcriptions were distributed to all team members to read. After this review, the team members met several times to identify key themes and supporting quotes. During these meetings, summary notes were taken and used to draft a report. Report drafts were then reviewed by at least three team members and revisions were made for accuracy and clarity. This process assured that multiple readers and reviewers were engaged in the qualitative analysis and writing.

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**Table 1: General Flow and Content<sup>5</sup> of Focus Group and Key Informant Interviews**

Focus Groups		Key informant interviews		
ECE directors/Staff	Boomer Volunteers	Boomer Volunteers	Volunteer Directors	ECE directors/Staff
Expectations, perceptions, and experiences with volunteers (all and Boomers) in your EC programs	Expectations, motivations, and experiences as EC volunteer	Expectations, motivations, and experiences as EC volunteer	Experiences with older adult or Boomer volunteers	Expectations, perceptions, and experiences with volunteers (all and Boomers) in your EC programs
Attractive or unattractive features engaging Boomers as volunteers in EC	Attractive or unattractive features of volunteering in EC program	Attractive or unattractive features of volunteering in EC program	Desired characteristics of volunteers in various EC roles; direct work with children, parent education, consultation	Desired characteristics of volunteers in various EC roles; direct work with children, parent education, consultation
Challenges or barriers related to older adults working with families, with children or in advocacy and/or consultation roles	Interest/concerns for volunteers in various EC roles: directly with children, child care, literacy, parenting education and support, advocacy or consultation	Interest/concerns for volunteers in various EC roles: directly with children, child care, literacy, parenting education and support, advocacy or consultation	Effective strategies to recruit and retain volunteers in various EC roles	What would EC program need to support Boomer volunteers
Feasibility of various structures and incentives to attract Boomer volunteers (e.g. flexibility, stipends, job-share, etc)	Personal importance of various structures and incentives for volunteering (e.g. flexibility, stipends, job-share, etc)	Personal importance of various structures and incentives for volunteering (e.g. flexibility, stipends, job-share, etc)	Importance of various structures or incentives (Flexibility, stipends, etc); how these are best handled with sites, volunteers	Feasibility of various incentives and structures to attract Boomer volunteers (e.g. flexibility, stipends, job-share, etc)
Other thoughts; advice	Other thoughts; advice	Other thoughts; advice	Other thoughts; advice	Other thoughts; advice
Demographics	Demographics	Demographics	Demographics	Demographics

<sup>5</sup> All interviews probed perceptions of volunteers/Boomers in five areas of service: Parent education and support, early literacy, work in child care settings, advocacy for young children and/or consultation with early childhood programs on issues such as workforce development, strategic planning, finance and taxation.

## Boomers as Volunteers in Early Childhood

### FINDINGS: Boomers on Volunteers

#### Boomers Views on Volunteering

The Boomers were for the most part experienced volunteers. All but one of our Boomer focus group participants had served in a volunteer role; most were currently engaged and active volunteers. Similarly, almost every member of our key informant Boomer sample was currently volunteering. Among these active volunteers, most were volunteering in more than one capacity and serving an average of 15-20 hours a week. Several indicated they were “full-time” volunteers, investing 40 hours or more a week in volunteer work.

These active volunteers were involved in a diversity of roles around a range of issues. Many volunteered to support community events. Volunteers also commonly supported youth, young children, and schools. Others volunteered around specific issues important to them centered around arts and culture, political issues, housing, hunger, or the environment.

Many of these active volunteers took real leadership roles within organizations by serving on boards, directing special initiatives, and consulting with programs in ways that made use of their professional skills in management, fund-raising, marketing and education.

Our interviews with these active volunteers offered insights into these Boomers’ motivations, expectations and perceptions of their actual volunteer experiences. They also told us about conditions or incentives that support their engagement.

#### **Motivated by a Sense of Obligation**

Most of our Boomers indicated having deep roots in volunteering that were motivated by a sense of familial, social, or parental obligation.

Many of our Boomers said that they had grown up in a family that fostered volunteering and that this ensured their early and continued engagement in volunteer service. One Boomer focus group participant explained, *“I started volunteering in elementary school. I think it’s a life long habit because it continued through high school, college, young adulthood. It just followed me.”* Others indicated similar experiences. A key informant explained her life long engagement saying, *“One of the things my family stressed is that whatever goodness you get for yourself you have to give back.”*

***We’re the ones who  
wanted to change the  
world...***

For others, volunteering began in early adulthood with a sense of social obligation they saw as unique to their cohort. One participant stated, *“We’re the ones who*

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wanted to change the world when we were younger and here it is!" Another emphasized, "If you're not part of the solution you're part of the problem."

Still others entered the volunteer arena as parents who wanted to be involved in their children's lives. One parent explained, "I had kids that went to school. I started with that and then just continued."

Whether motivated by family values, a sense of social obligation, or parental commitment, once these Boomers were engaged as volunteers, one volunteer opportunity led to another. All of our engaged volunteers worked in sustained ways rather than on one-time efforts. Most volunteered in two or three capacities having been "hooked in" through personal contacts made in one volunteer context.

Among the minority who were not currently engaged as volunteers, motivation was not the issue. Instead, time constraints, competing priorities, and difficulties "finding a pathway" into the volunteer arena hindered engagement for these Boomers. Challenges around time were most often voiced by Boomers still working for pay; one participant said empathically, "I need to quit work [to have time to volunteer]." For others, the strain of balancing work and family obligations left little time to volunteer. As one explained, "We're what I call the bologna [sandwich] generation- the kids on one side and the older parents who need you on the other and my immediate family [the bologna] in the middle."

Among the Boomers who were not engaged in volunteering, many were new to their community. For these new arrivals, the challenge was not finding time to volunteer, but finding a pathway into volunteering. One reported calling a volunteer organization five times never to receive a call back. Another called non-profits to offer professional services as a fundraiser, but again did not receive a call back. Others talked of being told that volunteer opportunities were "full." Overall, it was not a lack of interest in volunteering, but a lack of a community program's organizational capacity to accommodate volunteers.

Only one participant had neither thought seriously about volunteering nor had been approached to volunteer. She said, "I just never gave it [volunteering] a thought until today. I am already busy, but maybe what I am doing isn't as beneficial or rewarding as it could be." She went on to say that if she could see that she could really benefit something she "might give up some golf time" in order to volunteer.

### *Boomer Expectations*

The Boomers we talked to expressed clear ideas about what they expected from volunteer opportunities. These expectations went beyond just wanting to stay busy. In keeping with their sense of social obligation to be "part of the solution," these Boomers expected to be fully engaged in their placement site as a volunteer

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and they expected to see the results of their efforts. One male participant quoted a study he had read by Met Life on the second half of life, saying “Whatever you do has to give you the 3 M’s: Meaning, membership, and mastery.”

**Meaning,  
membership,  
and mastery**

Many spoke about wanting to become an integral part of the organization they were working with or as one Boomer explained, “Something where you don’t feel like an appendage to the program, that you are identified as a volunteer, you are sort of you know, they can take you or leave you. To feel an integral part of the endeavor, whatever it is.” For some this meant essentially functioning as an “unpaid worker” who made a valuable contribution within the organization.

For some this more integral engagement meant using professional skills to contribute to an organization. A retired teacher explains, “I was an educator and it’s really hard for me to stop working with children. Although I really enjoy being retired, I like the idea of being intellectually engaged. I am vital, I’m not ready to sit down and pet the cat, as much as I like my cat.” Being recognized as making a “vital” contribution as a “real member of an organization” was important to many of our Boomers.

The Boomers we spoke with also expected to see the results of their engagement, even if only in small ways. They expected their volunteer efforts to help make individual lives and their community better. Some expected to see change in a big way and others expected to be a “small part” of the change process, but all wanted to know they were helping to make a difference. As one Boomer explained, “[it is all about] the benefits that you see in just watching the kids develop and seeing there is going to be a world after we’re all gone—that’s pretty neat.”

### *Boomer Volunteer Experiences*

As we listened to Boomers describe their actual experiences, there often seemed to be a mismatch between expectations and realities in the volunteer world. Although the motivation to volunteer and become engaged in meaningful ways was strong among our group, these Boomers often reported challenges in getting in, getting integrally engaged, and feeling meaningful in their volunteer placements.

Finding a pathway to any form of volunteering was a challenge for some. One long time volunteer explains, “We’ve all been involved in different programs from the ground up. Somehow [other] older people don’t know about these opportunities. If they did they would gain that same kind of feeling about volunteering.” This challenge was especially pronounced among those new to a community or in retiree communities.



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More often, the challenge was not just getting in, but “getting in” in ways that were meaningful. A new retiree to small southern Oregon community explains her experience in trying to engage in ways that use her professional skills, “I have found several organizations I have approached saying ‘I have a professional background, I would like to help your fundraising initiatives’ and they don’t have the time or inclination. I did not get several call-backs from organizations that I contacted.” The frustration was clear in the tone of her voice. She felt she had something vital to offer but could not get in the door.

Some Boomers in the group told us that in their quest to be fully engaged, they became frustrated by a lack of control or sense of powerlessness in their role. They expressed the sentiment that as “a volunteer you don’t really have any teeth” in a larger system filled with professionals. Speaking about her volunteer time with CASA, one Boomer explained:

*“It turned out to be more of a sacrifice... because you’re depending on case workers, the courts with court dates, and I got up to the point where I felt left out and yet they asked me to provide a report asking what the child’s needs are or what the child’s wants are, sometimes they just want a teddy bear. So it was a long wait, and then when your case finally got there [to court] nobody informed you as to what happened. What the result was of this. So it always felt like it was open-ended.”*

Another reinforced her point adding, “It’s a problem with volunteerism in general ... if you don’t agree, if you feel strongly that things are not right, you really feel powerless and it’s very hard. You’re in the system, but you are powerless... it’s not like as a volunteer you suspend your critical faculties. As a volunteer, you don’t really have any teeth.”

A number of Boomers spoke about disappointing experiences engaging with organizations that were not ready for volunteers. Organizations that didn’t call back, weren’t prepared to engage volunteers, or were poorly run were a turn off for Boomers. One very engaged respondent cautioned about the level of concern this presents for Boomers in particular:

*“Volunteerism is potentially at risk with the emerging baby boomer generation...there is going to be a set of expectations of volunteers coming into the volunteer marketplace, they are not going to be satisfied... how many times is [a prospective volunteer] going to go banging on the door and not get an answer... after awhile you know, she’ll find something else to do with her time.”*

**Some organizations were not ready for volunteers...**

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### Factors that support volunteer engagement

The Boomers in our focus groups and informant interviews had many ideas about what supported their engagement as volunteers. Across the interviews, particularly important features were flexibility, organizations that were prepared to train and support them, opportunities for meaningful work and social engagement, and mileage reimbursement.

#### *Flexibility*

In general, Boomers wanted volunteer opportunities that offered the flexibility they need to balance other obligations. *“For me, flexible hours, days and times are very important. My husband is still employed and when he can go somewhere we go because that’s the only chance we get.”* Another summed up a shared sentiment among the Boomers saying, *“There are a lot of demands on us even if we are retired. We’re still involved in a lot of things.”* Some also wanted the flexibility to move in and out of paid work as one reported, *“...when I retired initially I wanted the option to work for pay occasionally. I don’t want to think that my limited income is that way forever!”* One informant was emphatic, *“I wouldn’t volunteer without flexibility.”* Volunteer program staff members who were interviewed affirmed that in their experience with Boomer volunteers, flexibility is paramount.

***I wouldn’t volunteer without flexibility***

#### *Organizational support*

The Boomers we talked to wanted support from the organization as well. They indicated that training, guidance, feedback and protection from liability were important supports to them as volunteers. Training was identified in all the focus groups and was echoed by the informant interviews as being an important support. It was clear that Boomers wanted to feel competent in their volunteer role and that clear communication about expectations and adequate supervision or guidance were an important piece of the process.

***Training, guidance, feedback, and liability protection***

Boomers had distinct ideas about effective supervision.

Although most were clear they did not need supervision such as someone *“looking over my shoulder,”* several mentioned wanting *“someone there who can guide someone on how to do a good job”* or *“another person there, mostly to help me do the right thing before I figure out what I’m doing.”* One Boomer explained these expectations for supervision saying, *“There ought to be a way to guide someone gently...to say to [volunteer], ‘Well, now, let’s try it this way...’”* Another emphasized, *“It is important that paid staff don’t have so much on their plates that they can’t be there for the volunteers.”* Several Boomers linked supervision to clear expectations: *“You can’t do a good job unless it is clear to you and everyone else what the expectations are. You need a clear job description – even if it [the description]*

## Boomers as Volunteers in Early Childhood

*changes from time to time. Expectations have to be clear about the job and whether time is flexible or not... just so everyone knows the expectations.”* Boomers not only wanted training and supervision with explicit expectations, but also clear communication about the value of their work to the organization. Repeatedly we heard, *“It’s not the recognition from others, but it’s a sense that you are accomplishing something and feedback that you are accomplishing something.”*

More specific comments involved the value of matching volunteer skills with organizational needs and expectations. Boomers noted that it was critical to match volunteer skills with particular needs in an organization. *“Businesses don’t just hire someone to help out. They have a need and they find someone to fill it- that is what we [volunteers] need too.”* Volunteer program staff endorsed the idea that volunteer success was only possible when real organizational needs were matched to volunteer skills.

Finally, a number of Boomers we interviewed were concerned about issues of liability. They were attracted to volunteer opportunities that were, *“Set up for volunteers to be safe.”* One Boomer explains more, *“I think protection is important. For a while there were so many allegations of molestation.”* Several mentioned “rules” used by Boy Scouts and other youth organizations to protect both youth and adults: *“No adult can be alone with a child; there always has to be another adult.”*

### *Meaningful work*

A particularly strong theme that emerged from our Boomer interviews was that volunteer opportunities needed to be structured in ways that meaningfully engaged volunteers as being integral to an organization. Participants spoke about what an organization should do to engage volunteers in meaningful work. Several Boomers believed that this would require real organizational change. One Boomer who had both coordinated volunteers and volunteered talked of the level of change needed saying,

***“... It’s a paradigm shift to give big pieces of responsibility to volunteers...”***

*“... it’s a paradigm shift to give big pieces of responsibility to volunteers, because I think, there’s the typical things I can be a board member, be a committee member, but to manage a particular program I think there’s a tendency to be afraid to give that much responsibility to a volunteer, because there’s apprehension that they won’t follow through.”*

Another added,

*“It’s easy to say and very difficult to do, but if an organization wants to effectively use volunteers as a resource, they need to approach it from [a business] standpoint... Volunteers should be considered unpaid staff rather than simply volunteers.”*

## Boomers as Volunteers in Early Childhood

Participants discussed the necessity of recruiting people for real jobs, training, supervising and recognizing them to build loyalty, and “succession” planning to prepare for the eventuality that *“people will move on and you will have a position to fill.”*

### *Opportunities for Social Interaction*

Whether through working in teams or interacting with staff, Boomers cited opportunities for social interaction as another factor supporting their engagement. Across the interviews, Boomers said *“it’s a people connection.”* And volunteering is a way to *“connect,”* to *“build relationships,”* and to *“see people.”* The social aspects of volunteering were especially noted by Boomers in rural Maupin in Wasco County. *“It’s the connection with people ‘cause we wouldn’t see anybody in the winter if we didn’t [get out and volunteer].”*

Although no Boomers identified “job sharing” as a high priority for them personally, several stated that they desired the opportunity to interact with others and to *“feel part of a team.”* One participant proposed pairing volunteers and professional staff as a way to offer effective supervision and mentoring for especially challenging work. Another suggested that volunteer-staff teams could be a strategy to limit liability exposure for organizations offering direct services.

### *Mileage Reimbursement*

Beyond the time devoted to volunteering, few Boomers noted any “costs.” When asked directly about the importance of stipends for volunteers, almost all participants ranked stipends lower than training and supervision and opportunities for social interaction. A few mentioned having limited incomes, but even these participants did not specifically express a desire for stipends.

In contrast, most participants were eager to be reimbursed for their mileage expenses. One CASA volunteer said she requested to be assigned a new case closer to her home because driving across the county has *“gotten too expensive.”* Other participants also noted the cost of fuel as a potential limitation to volunteering. Another indicator of the value of mileage reimbursement was the enthusiasm with which participants received the gas cards that were given out as incentives for their participation in the focus groups.

## **Specific Barriers to Volunteer Engagement in Early Childhood**

The most universally identified barriers to working with young children and families were the high level of need and lack of understanding of today’s young families, especially those who are most vulnerable.

## Boomers as Volunteers in Early Childhood

Participants said the high level of needs in young children and families would be overwhelming and “too depressing.” One former kindergarten teacher said, “I see a bigger need than ever. [But] I am reluctant to get too involved because I know how sucked in you get. It is very difficult to have a small involvement with a needy family. Families are really pressured now... you see it is really hard to say well I have an hour with you this week... there’s not really a lot of support [for families] so it’s overwhelming.”

In a different focus group, the Boomer mother of a kindergarten teacher said it would be hard for her to set personal limits on her involvement. “You’re going to get in there and see other needs that bring dollar signs. Junior doesn’t have a coat and its winter time. Do I or don’t I help? How do you decide to what extent? You can really get sucked in... Well my daughter [who is an ECE teacher]... how many coats did she buy for her students last year?”

Relating her experience as a literacy volunteer with preschool children, one participant said: “Even little kids come with baggage... A four year old boy threw a book at me ... it turned out that the father had just left the family and the little boy was angry. .. How do you deal with that as a volunteer? If you don’t have training and you’re getting things thrown at you, you duck and run.”

**Even little kids come with baggage...**

Making a similar point, another participant said: “When things get too demanding, you don’t want to volunteer. It [volunteering] has to have its limits...”

Several participants said they were willing to volunteer with young children if it was “up-beat” or “fun,” but that emotionally difficult work was not what they wanted as a volunteer. “I’m going to be painting faces on family fun day this Saturday.” More challenging volunteer work was not attractive especially without considerable direction and support. A former CASA volunteer said directly “[CASA] just felt to be too much work and not very much support. It was just too draining, too depressing.

Many Boomers were wary of work with vulnerable young families. Several acknowledged that beyond the great material needs of families, they simply didn’t understand “today’s generation of families” because “their culture is so different than ours.” One participant said it was hard for her to understand “the realities of today’s families.” She and others acknowledged the need to have considerable “compassion” to be useful to young families. Another noted that “You may have good intentions but you’re going to have to have respect for whatever family you’re involved with...”

A minority of Boomers were more open to direct work with young families, although all acknowledged this work would be very challenging. One said, “When you are

## Boomers as Volunteers in Early Childhood

*dealing with a family there are boundaries... just like with your own kids, you can't run their lives... you may not respect their values but there are things you cannot change ... there would have to be a lot of training because you could do some serious damage...you'd have to learn to influence, not go in and try to change them."*

### **Other barriers to working with young children**

Beyond high levels of need, the potential for over-commitment, and the generational difference between Boomers and young families, Boomers identified five additional barriers to working with young children.

- Boomers acknowledged that they had more limited energy levels and less stamina than young children. Some simply said they lacked the "patience to work with young kids."
- Boomers feared that young children had "too many illnesses, viruses and colds" that may threaten Boomer's health.
- Language and cultural barriers were perceived as limitations for working with the state's growing Latino population. One Boomer noted "My Spanish is horrible."
- A fourth barrier was a perceived technology gap. "Personally I am pretty divorced from what's going on now ... I barely understand what an MP3 player is. So I think the technology gap will widen." Even if this did not pose a problem in interactions with young children and families, it was seen as a potential barrier to work in today's organizations.
- The final barrier identified was the issue of liability specific to working with young children.

### **Advice from Boomers to organizations**

We asked our key informant Boomers what advice they would give early childhood organizations who want to engage Boomers. Their advice:

- 1) create flexible roles offering variable levels of commitment
- 2) get out into the community and clearly advertise your need
- 3) match volunteer skills with program needs
- 4) maintain communication with volunteers
- 5) show your appreciation to volunteers

**Create flexible roles offering  
variable levels of commitment**

Summing up this advice, one Boomer informant explained:

*"I think the important thing is to decide what is the work that the volunteer can do that would really assist the program, and to make it clear to the volunteer how this is a help... that kind of information I think makes a difference for the*

## Boomers as Volunteers in Early Childhood

*volunteer, because you know that you're not running the program, you know you're not the absolute heart of what's going on. But if folks in EC can have the time to explain to the volunteer why it is so important that this work get done on this time schedule with these parameters, then I think it allows the volunteer to feel like this matters."*

### FINDINGS: Early Childhood Programs

#### Early Childhood Programs: Views of Boomer Volunteers

All child care programs involved in this study had used volunteers, and most continued to do so. The most common types of volunteers were high school or college students who were meeting academic or community service requirements. These young volunteers were valued for their enthusiasm, reliability (*"they have to come or they don't meet their requirements"*), eagerness to learn, and flexibility. Several directors nodded in agreement when one said, *"Young people come with fewer expectations or needs for order or clarity than adult volunteers."* Although some concerns were expressed over students' appearance (tattoos, dress) and language, generally these young volunteers were reported to be "liked" by the young children and EC staff.

One key informant was an EC director who had extensive experience engaging both students and Boomers as program volunteers. She stated that it was much easier to use (high school and college) students in general child care settings because of the energy demands. She felt that it was better to engage Boomers in more structured "mentoring" relationships with individual children. She said, *"It is easier to set clear expectations in more one-to-one relationships, whereas childcare can be 'chaotic'. Boomer volunteers like predictable situations, times and relationships and smoothly running volunteer programs. I guess you could say they want flexibility in time commitments and structure in their jobs."*

Among programs that had used adult volunteers, including Boomers, the consensus among focus group members was that most adult volunteers wanted one-time, short-term, focused roles – such as building playgrounds, repairing toys or equipment, annually reviewing children's immunization records, developing websites or other program materials, or helping with limited-time events (e.g., fund-raisers). In one key informant interview, a senior volunteer program director supported the idea that most Boomers wanted short term, "sporadic and episodic" volunteer jobs, saying: *"They want to come in, utilize their skills, complete a project, stand back and say 'Wow! That's really cool!' and then [they want to] go to Mexico for two weeks."*

**Boomers: Only one-time, short-term, focused roles?**

## Boomers as Volunteers in Early Childhood

All participants valued the contributions made by Boomer volunteers in short-term assignments. For example, in one focus group, a child care center director spoke about an occasional and responsive volunteer who made numerous finite but valuable contributions to the program, saying: *“We have a school bus driver, he’s a Boomer, and he comes and drives the school bus for field trips. Name it he does it. He recently finished up a fundraiser that we made 5800 dollars and all he did was come and pick up plastic grocery bags and takes them to Wal-mart for us and we made that kind of money ...”*

In focus groups, the clear perception among EC directors was that the only long-term volunteer commitment Boomers wanted was service on advisory boards. In their experience no Boomer volunteers wanted to make longer term direct service commitments. Only one focus group member, the director of a large child care center, spoke warmly of a retired music teacher who provided musical instruction on a regularly scheduled basis over several years. This music program did not disrupt the regular classroom because children were pulled from their classrooms to participate.

Compared to focus group participants, key informants were more likely to say that in their experience Boomer volunteers desired a full range of volunteer roles from short term, focused jobs to longer-term mentoring relationships with individual children or clerical and administrative roles in programs.

### **Volunteer Recruitment and Retention**

Most focus group participants reported that their EC programs did not actively recruit volunteers. Rather, most said, *“We wait for people to come to us.”* Some participants reported individually contacting potential volunteers they knew personally, usually with a specific request aligned with individuals’ skills. Others reported targeting children’s families – parents and grandparents, although private “for-pay” centers stated that this has not been an acceptable practice in the past.

In contrast, several EC key informants reported taking deliberate steps to recruit Boomer-age volunteers. One said *“[Our program] is a coalition of churches and other organizations, we use our coalition partners to recruit volunteers – we advertise and give speeches at our partner organizations talking about our program and its needs- including specific jobs we have for volunteers.”*

Both focus group participants and key informants who felt that they were successful in recruiting adult volunteers believed it was because they had offered 1) “real, meaningful” work for volunteers to do, 2) a range of options for volunteer work, and 3) one-time opportunities to get “buy-in.” All agreed that once a volunteer successfully completed a task, the EC program was

**... Be ready  
BEFORE  
you start...**



## Boomers as Volunteers in Early Childhood

likely to contact this volunteer again and vice versa. One key informant, a volunteer coordinator for a multi-program EC organization, summed this idea up when she described the way she recruited and retained Boomers: *“Offer one-time tasks that are well-organized, give them the opportunity to work with people they know - like a group from their church or service organization, make it a success and recognize their effort. Most will want to come back for other work – and gradually they are committed to your program [and are willing to take on more].”*

Key informant interviews with EC directors and volunteer program directors produced several additional “tips” for recruiting, and then retaining, Boomer volunteers. These included:

- Go to the organizations (churches, service clubs, work) where Boomers are
- Recruit Boomer groups to work together on a single task or project like fund-raising or an event
- Be organized – have all materials or resources needed for the project available.
- Emphasize human contact and conversation: Use your contacts and networks to reach people. Take and return telephone calls from every potential volunteer who calls. Boomers prefer human connections to the web
- Be flexible in timing of commitments, be clear about the job expectations
- Promise relevant training (not just how to fill out forms)
- Give specific positive feedback to help them succeed
- Emphasize the human impact of their work – *“You helped Johnny learn to read.”*
- Say thank you often in person, in notes, or in any other way you can
- Reduce bureaucracy and paperwork

One key informant, an EC program director who was successful with volunteers, succinctly stated her formula for recruitment and retention: *“Have in mind really specific projects, tasks or jobs before you begin to recruit. Have very clear expectations, know where you can be flexible in timing or scheduling work, make presentations to community groups where Boomers are. Be ready – have everything ready - background check forms, job descriptions and training and supervision, and all resources they will need. Once you interview, match and place them, give them useful feedback... Tell them what contributions they are making, how they are helping. [Because] if they feel [we value their contributions] and they are getting something out of the experience – then they’ll return.”*

### Senior Volunteer programs

In terms of recruiting older volunteers, several focus group participants knew of local senior volunteer placement programs like RSVP<sup>6</sup> but most reported no contact or felt little support from these volunteer placement programs. The common sentiment was *“they [RSVP] don’t know we exist”* or *“they [RSVP] don’t discuss us [as a*

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<sup>6</sup> RSVP = Retired Senior Volunteer Program

## Boomers as Volunteers in Early Childhood

placement option] unless someone specifically asks for us.” In key informant interviews with RSVP and other volunteer placement programs, these perceptions were confirmed. One volunteer placement director said, “Beyond wanting to be a Foster Grandparent or SMART reading volunteer, very few of the people ask to work with kids.” Another volunteer placement director noted that they had so many agencies requesting volunteers that “we don’t have to go looking for placement sites [agencies] for volunteers – they [agencies] come to us.”

### EC Program Expectations for Volunteers

When asked what they expected from a volunteer, the EC directors and staff in focus groups were consistent and clear. They wanted the “same things we want in good employees.” The specific characteristics mentioned most often in focus groups included:

- Commitment (“buy-in”) to the program’s philosophy
- Dependability and reliability, especially when working with “vulnerable” children
- Understanding of child development and effective “developmentally appropriate” practices with young children
- “Trainability” - willingness to participate in training and learn
- Willingness to be supervised and to respond to direction – even if the supervisor is younger than the volunteer
- Professional behavior: Appropriate interactions and language, confidentiality, respect for diversity and family values, respect for boundaries and roles
- No criminal background, drugs, or alcohol use

During key informant interviews participants were asked to identify what they would look for in a volunteer who was going to work with children and families. Repeatedly, the key informants identified the following personal qualities: compassion, empathy, open-minded, tolerance, and patience. One EC director key informant summed it up when she said: “I am looking for people who have a heart for children and families, who are very open-minded and able to work with diverse backgrounds and different values and beliefs [than their own] - and who is able to pass a criminal background check.”

**... A heart for  
children and  
families...**

### Challenges with Boomer Volunteers

#### ***The challenges of working with young children***

A few directors, themselves Boomers, flatly dismissed the idea that Boomers would be interested in volunteering with young children. Comments included:

“No Boomer is going to say, ‘I just feel compelled to come help kids every Friday.’ That’s not going to happen here.”

## Boomers as Volunteers in Early Childhood

*“This is a retirement community. People come here to get away from commitments.”*

*“One Boomer told me, ‘I worked for 32 years, now I am going to rest and play for 32 years.’”*

A senior volunteer program key informant seemed to agree when she said: *“Unlike people in their 70’s, most Boomers are just now retiring and getting their first break from work. They are tired, they want to have fun, they don’t want to volunteer.”*

Several other participants commented that they did not think that many Boomer volunteers were really interested in sustaining direct care with young children. They gave several reasons for this perception. *“Once kids are past being cuddly and cute, they aren’t as appealing.”* Others noted that *“Working with young children is hard - both physically and emotionally”* and *“Childcare can be kind of crazy – the unknown and changing conditions are problematic for those [older] folks.”*

Among those programs that had used adult volunteers in the past and were no longer doing so, all reported frustrating, negative experiences with volunteers who “didn’t come back,” because they found the behavior of young children too challenging. Further, a number of program staff shared stories of challenges associated specifically with volunteers who worked with vulnerable children and families. One second-grade teacher related:

*“Sometimes kids will share things that families wouldn’t want them to share. When [the volunteer] was in, a child was talking in great detail to [the volunteer] about seeing her uncle getting arrested the day before and it was a little bit shocking for [the volunteer], she hadn’t been in an environment where that would have been a normal occurrence [like it is for some of the families]. And I think it made her rethink being a volunteer [given] that she would have these kinds of conversation with kids.”*

### **Generational Differences and Conflicts**

Several EC focus group participants and key informants agreed that many volunteers -especially older volunteers - were unprepared to deal with the realities of early childhood today, including diversity among families and children who exhibited challenging behaviors. Most participants agreed that Boomers had “lifetimes of experience to share,” but many also were concerned that that older volunteers would have “a lifetime of [inappropriate] responses” and would lack knowledge of “contemporary” techniques and “best practices.” There was concern that training might not overcome the long practiced language and behaviors.

**“... A lifetime of responses...”**

In a focus group of ECE directors, vigorous head nodding was generated by a participant’s story of *“an older volunteer who just would not learn and respect our*

## Boomers as Volunteers in Early Childhood

school's philosophy – especially our approach to [child] guidance (disciplining a child).” In other focus groups, participants spoke of older volunteers using language (e.g., “you are a bad boy”) that was inappropriate for working with children, especially those from diverse backgrounds or who exhibited “challenging behaviors.”

### **Training, Supervision and Boundaries**

All focus group participants and key informants agreed that volunteers, similar to staff members, required training and supervision to be successful. This was especially a concern among EC programs that worked with very vulnerable children. For example, the director of a program serving special needs children said, “[In] our special education classrooms, the children are so individual in their needs and the programs are so specific ... [that] the training component would be significant.” Another said: “Child care is not baby-sitting – volunteers need to understand that [there are professional practices they have to learn and follow].”

However, a common concern was that older volunteers may be unwilling to consistently respect the younger teachers or staff who would most likely be the volunteers' supervisors and mentors in a classroom or program. Participants spoke of concerns about, “boundary issues and lack of clarity about who is in-charge.” Volunteers need a “clear vision about who is in charge in a classroom and it is not them no matter how much life experience they have.” One director noted “we don't need untrained volunteers who take over.”

### **Confidentiality and Professionalism**

Participants agreed that all staff and volunteers need to understand the need for confidentiality and realize that “they can't have grocery store [public] conversations about children and families... or the program.” Several program staff also spoke about the struggle with balancing a family's right to confidentiality with what volunteers need to know in order to effectively work with a particular child. As one Head Start teacher described,

*“Confidentiality is a big issue especially when they're parents sometimes they'll pry for info about other kids. Some things are obvious when you're in the classroom, but you have to know the right amount of info to give to the parents and I think if you had a community volunteer who [worked] directly in the classroom they would need a certain amount of information to be able to work with the child. And it's trying to find that line between [giving volunteers] the right amount of information without violating the privacy rights of the child and families.”*

Most participants believed that it is easier to train older adults to understand confidentiality than it might be to teach “contemporary best practices.”

## Boomers as Volunteers in Early Childhood

### **Preparing Staff and Children for Volunteers**

Several focus group participants noted that teachers had to be prepared to work with volunteers. Some staff members “*don’t want volunteers,*” either because they don’t know what volunteers can or should do or they don’t know how to supervise volunteers. Staff training must enable staff to understand volunteers’ roles in the classroom/program as well as to prepare staff to “*effectively supervise and communicate with volunteers.*” If these staff members see their role as “*just more work for them, they resist.*”

To encourage herself and her staff to utilize volunteers, one EC key informant said that she emphasized how much volunteers “*extend our reach... and expand our program further than we [staff] could on our own.*” Similarly an EC focus group participant said: “*Everyone [on our staff] needs to understand that volunteers will take [staff] time and attention but are worth it if they give us a better adult –child ratio or more hands to help with a child who needs one –to –one attention.*”

Several participants noted that children as well as staff need to be prepared to “accept” volunteers in the classroom. “*[Children] need to know who their teacher is and who is the teacher’s helper – and the difference [between the teacher and the volunteer].*”

The day after one focus group, a participant called the facilitator to say that she thought that children and staff needed help to understand aging, disability and the potential death of older volunteers. She reported the trauma experienced in a preschool in which a long-time volunteer became ill and died, saying “*None of us [staff] really knew what to say to the kids – it was especially hard because not everyone had the same beliefs about going to heaven, so what some families said at home didn’t really fit at school.*” This participant noted that she did not bring this up during the focus group because it was “*too depressing.*”

### **Other Barriers**

Beyond the specific challenges with volunteers listed above, three other barriers to engaging volunteers were mentioned: letting volunteers go, liability issues and the cost associated with volunteers.

#### *Letting volunteers go*

Several participants were concerned about how to end a volunteer relationship that is “*not working.*” Again this generated stories of poor fits or situations that had been difficult to handle. One director said directly, “*Not all relationships are good ones. We need a way to disengage volunteers when ‘imperfect scenarios’ arise.*”

## Boomers as Volunteers in Early Childhood

### *Liability*

One other issue raised several times was liability, such as the injury of a volunteer or a volunteer injuring a child while on the job. “*We have to be sure that our [liability] insurance would cover a volunteer [if a child was injured].*” In a somewhat related concern, focus group participants and key informants frequently noted that criminal background checks would be needed on all volunteers. These checks take time and money.

### *The costs associated with volunteers*

Participants were quick to note that while volunteers might not receive monetary compensation, they are not free labor. Certainly this was clear in the key informant interviews in which informants described the list of jobs associated with effectively utilizing volunteers – from recruitment, matching and placement to supervision, mentoring, and performance evaluation.

At the very minimum, programs have to invest time in training, supervision, and scheduling of volunteers – just as they would staff.

*“I have to ask myself is it worth it to have one more person to deal with – is what they [volunteers] give the kids worth the investment of my time?”*

The costs associated with having volunteers were an especially vexing concern for smaller programs with very thin administrative structures (owner/director/teacher). Administrative time to interview and match a volunteer to program needs or a job is sorely limited in such organizational climates. But even in larger programs there were concerns about how to add working with volunteers to an already full plate. For example, vigorous head nodding supported one director when she said:

*“I don’t have time to recruit, interview, and train and supervise volunteers. And I don’t have anyone [any staff member] who does [have this time]. It is a whole other job.”*

**... Volunteer  
management  
is a whole  
other job...**

In short, time and financial resources to support training, volunteer job related expenses and volunteer recognition are non-existent in most child care centers and programs. One participant described these expenses as “*support for the burden of having volunteers.*”

## Boomers as Volunteers in Early Childhood

### Resources to Support Boomer Volunteers

Both focus group participants and key informants were asked to rate<sup>7</sup> the feasibility of specific incentives or accommodations to encourage Boomer volunteers. Overall, there was agreement that only incentives or accommodations that had little or no cost were realistic. Those that would require dedicated staff or money were not realistic in EC settings without additional funds. For example, EC directors ranked the following as:

#### **Very realistic:**

- Flexible hours, days or times of the year (as long as these were agreed upon in advance)
- Job-sharing and/or working in teams with other volunteers
- Basic orientation and training, follow-up supervision or advice (provided by staff at the placement site)

#### **Moderately realistic:**

- Volunteer matching and placement
- Formal recognitions (beyond “thank you”)

#### **Unrealistic:**

- Formal recognitions that require significant funds
- Attendance at conferences, workshops or other training not offered by the site
- Stipends or pay
- Mileage or other expense reimbursements

**... Volunteers  
bring costs  
as well as  
benefits...**

Several directors agreed that the above incentives and accommodations “made sense” in a well organized volunteer program. However, all also acknowledged that without additional funds EC programs could not offer anything beyond flexible scheduling, job-sharing and basic orientation. Offering even these simple accommodations was described as a “stretch” that would overload the EC director and some staff.

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<sup>7</sup> Rating were on a scale of 1 (not realistic) to 4 (very realistic)

## Boomers as Volunteers in Early Childhood

Clearly focus group and key informant participants recognized that volunteers bring costs as well as benefits to EC programs. Participants in key informant interviews and focus groups identified the following as program costs associated with an effective and well-run volunteer program:

- Development of volunteer guidelines<sup>8</sup> and clear descriptions of individual positions
- Volunteer marketing, outreach and recruitment
- Prescreening and criminal history checks<sup>9</sup> for all volunteer applicants
- Volunteer matching and placement
- Volunteer scheduling and coordination
- Site preparation and training
- Volunteer pre-service and in-service training
- Volunteer supervision and problem-solving
- Volunteer recognition
- Evaluation of volunteers and volunteer placements
- Liability insurance
- Volunteer expense reimbursement

All participants agreed that it was “reasonable” to reimburse volunteers for mileage and other expenses and/or to provide stipends, but all also said that their EC program could not absorb these expenses. Others noted that such practices would require more “bookkeeping,” which in itself would raise program costs. One focus group EC participant summarized the feelings of all when she said: *“Anything that is going to cost us [EC programs] money is out of the question!”*

Finally, a long-time EC program director said she hoped that if *“... a program [is] going to place [Boomer volunteers in EC, that program should be based on] cutting edge information and best practices [regarding volunteers].”*

### Summary

In both focus groups and key informant interviews, the EC directors and staff were cautiously optimistic about the potential offered by engaging Boomer volunteers. All had or were using adult volunteers, most often on advisory boards and fund-raising efforts, in clerical or simple administrative tasks, and other episodic, occasional roles.

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<sup>8</sup> A few of the larger EC programs had developed volunteer recruitment materials and guidelines.

<sup>9</sup> Criminal and protective services history checks are required of owner, operator, employee or volunteer of a certified, registered or otherwise regulated facility caring for children that is subject to the jurisdiction of the Oregon Child Care Division. The OCCD requires that an individual's criminal history and child protective services records are checked prior to an individual assuming job responsibilities in the above settings. An employer who wants to hire an individual to work with children must verify with the Child Care Division that the potential employee is enrolled in the Child Care Division Criminal History Registry. The Oregon Criminal history application cost is \$3.00; an additional federal FBI check may be required under certain conditions including residence in Oregon for less than 18 months. The cost of the FBI check is \$62.00.



## **Boomers as Volunteers in Early Childhood**

In terms of more direct work with children and families, they valued the potential benefits offered by longer volunteer roles, such as board membership and teaching or mentoring. They also valued the contributions made by shorter-term focused volunteering that meet specific program needs.

They acknowledged the skills and knowledge possessed by many Boomers. Nevertheless, several EC directors expressed concerns with volunteers' understanding of confidentiality and contemporary practices with children and families, especially those who were vulnerable or challenged. The EC directors realized the importance of matching, placement, training and supervision but without funds, most "staffed" their volunteer effort by simply making extra demands on themselves and their staff members. Uniformly they believed that targeted volunteer programming could benefit their EC programs, children and families.

## **Boomers as Volunteers in Early Childhood**

### **Implications and Recommendations**

The themes emerging from the interviews with Boomers, Early Childhood program directors/staff and volunteer placement program directors have distinct implications for any initiative designed to engage Boomers in support of Oregon's early care and education system.

#### ***Reframing Volunteering in Early Care and Education***

Our interviews convinced us that part of the task of developing successful ways to engage Boomers in all of the EC roles that OCF has envisioned will require some reframing of volunteering within early care and education. Many of the EC program staff we interviewed were limited to traditional ideas about using volunteers in their programs. For example, they were aware of or already engaged Boomer-aged adults in SMART or similar literacy efforts with older children. Placing Boomers in direct service to families in parenting education and support programs was considered possible by EC directors and some Boomers so long as the volunteer was non-judgmental, patient, and respectful of diversity. In addition the volunteer should be well-trained and supervised. EC staff had not, however, thought through other more innovative ways to engage Boomers.

Volunteer placement agencies indicated a limited amount of Boomer volunteer placement in EC programs. This stemmed from a lack of communication between EC programs and local volunteer placement programs as well as few inquiries from Boomers seeking placement in EC settings.

Among those Boomers who are interested in volunteer service, only a subset is interested in work with young children. Many Boomers are concerned that direct service work with young children and families, particularly those who are very vulnerable, would be too demanding physically and emotionally. Moreover, many early childhood programs were concerned that Boomers were not prepared for the demands of direct service work with young children, particularly in child care settings, or for work with vulnerable families. Issues of concern include generational differences in discipline, lack of knowledge of "best practices" and contemporary approaches, and confidentiality. There were especially strong concerns that Boomers were not prepared to support the most vulnerable children and families without considerable training and supervision. These important concerns must be addressed before Boomers will be accepted in direct service roles in EC programs.

In addition advocacy was narrowly defined by both EC Program staff and Boomer volunteers. EC program staff described advocacy in terms of work with individual families. We spoke with two key informants who were involved in advocacy in Early Childhood. One had been working part-time following her retirement from

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government service. She was eagerly awaiting her up-coming “real retirement” during which she had “no intention of continuing to work this hard.”

The second key informant had a long-term interest in political advocacy that had continued into her retirement. Like other Boomers, she was attracted by “mastery, meaning, and membership.” No other Boomers in our focus groups or key informant interviews mentioned any specific experience or interest in advocacy; nor did EC programs mention advocacy as a needed area. Advocacy may be a volunteer arena in which it would be most fruitful to connect with Boomers who had been advocates for children and families in their professional lives.

As an initial step in reframing Boomer volunteerism, efforts should be aimed at educating EC programs about the depth of services that could be provided by Boomers and the value of these services to their organizations. As these views of volunteerism by Boomers are reframed and opportunities are presented to develop partnerships between EC programs, volunteer placement programs, and new initiatives for Boomer volunteers should consider the following:

### ***Recognize and Respect Boomers’ Diversity of Interests and Needs***

Boomers are a diverse group of individuals. This diversity is critical to consider as programs of any kind are developed. Some Boomers have retired and are seeking meaningful retirement activities, including volunteer service. Others continue to work full-time and have limited time for volunteer service. Most have considerable family responsibilities including providing support for aging spouses and parents along with adult children. Any effort to engage Boomers must respond to the need for flexibility in time commitments. Allowing for this flexibility may be difficult for some EC programs as they seek consistent interactions and relationships with their clients.

In contrast to the literature which emphasizes the idea that most Boomers are interested in professional level volunteer service, our informants were open to a wider array of volunteer service. Similarly, EC programs had many needs for volunteer support only some of which required “professional” or managerial level work. For example, those few EC programs that made use of Boomers greatly valued volunteers who served on advisory boards, led short-term fundraising efforts, drove children on field trips, and checked immunization records. These short-term opportunities were seen as a means to initially engage volunteers in programs. Boomers liked these options as they offered flexibility and made use of diverse skills. Programs aimed at engaging Boomers should take a broad the view of service options within early care and education. This may include preparing a “menu” of viable volunteer positions within individual EC programs. The menu could include a range of skill sets along with anticipated time commitments.

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For Boomers in this study, the critical part of any volunteer task was not the perceived professional level but rather the value placed upon their role by the organization. Boomers wanted to use their skills and time to make “meaningful” important contributions to people or organizations. They also wanted a sense of mastery or competence. Training and supervision were desired because they enabled the volunteer to be more effective. Boomer volunteers also wanted to be seen as real full-fledged members of an organization. Our Boomers confirmed the literature’s stance that friendship and social networks are primary motivations for many volunteers. Together with time flexibility to meet their other life obligations, Boomers found “meaning, mastery and membership” to be more important incentives for volunteer service than stipends. As programs consider potential roles for boomer volunteers it will be essential to articulate the importance and relationship of the volunteer work to the overall success of the organization.

### ***Organizational Capacity Is Critical To Success***

Boomers and EC programs were unequivocal in their shared desire for well-organized volunteer programs. It was clear, however, that most EC organizations lacked the capacity to effectively initiate and maintain a volunteer program; as one EC director said, “*It (running a volunteer program) is a whole other job.*” Boomers told stories of disorganized, poorly run volunteer experiences that clearly failed to meet their needs for meaning, mastery or membership. The critical components of organizational capacity can be seen in the model programs such as ReServe and the Experience Corps (see Appendix 1).

Central among these capacity components is a professional staff member on-site in the partner organization. These volunteer specialists

- Work with partner organizations to define specific positions for Boomer volunteers
- Recruit, screen, match and place Boomer clients with partner organizations that have needs that match the volunteers’ interests and skills
- Facilitate and provide training and supervision on-site
- Facilitate communication between the volunteer and the site
- Manage paperwork and reporting requirements
- Work with the volunteer and partner organization to assess the success of the placement

Our informants were clear that the above-listed professional support would be essential to the success of volunteers in early childhood, particularly in roles that link volunteers directly to work with children and families or in professional or managerial roles. Within the current structure of community EC programs, the staff and monetary resources to create the essential capacity for strong volunteer initiatives are simply lacking. This is particularly true of smaller and more rural EC programs. New initiatives should consider allotting funding for at least a paid part-time

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volunteer coordinator for EC programs in order to increase their capacity in identifying, training, placing and supervising volunteers. For smaller or more rural programs this position may be a collaborative effort on a community or regional level serving several EC programs.

Our findings illustrate the complexities surrounding the utilization of Boomer volunteers in EC programs. Unrealized potential exists in this opportunity. However, efforts to create a successful initiative must begin with EC programs, volunteer placement programs, and boomers reframing their current views and practices. By recognizing the diverse interests and needs of Boomers and being mindful of the need to increase the capacity of organizations, initiatives will be better positioned to have a beneficial impact on Oregon's early care and education system.

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## Appendix 1.

### Successful Model Boomer Volunteer Programs

Several programs have been developed to tap the potential of older adults including Boomers as volunteers and part-time workers. Three models that are particularly relevant to the Foundation's interest are *ReServe*, *Experience Corps*, and *Senior Corps*. Each is briefly described below.

#### ReServe

ReServe<sup>10</sup> is an award-winning nonprofit organization in New York City that recruits skilled retirees (ReServists) and uses an individualized placement process to place them with public service jobs that pay a stipend. ReServists work in a variety of roles, from human resources consultant to writer to group facilitator. The ReServists work with diverse organizations including intergenerational programs to meet the needs of children and teenagers, elder-to-elder services, and community justice initiatives. Some ReServists provide professional services for nonprofits and public agencies.

**ReServe emphasizes an individualized placement process**

Within its first two years, ReServe had screened and placed more than 400 qualified retirees at more than 100 nonprofit and public agencies in New York City since it's launching in 2005. More than two-thirds of ReServe participants are college graduates; 40% have advanced degrees. One-third of participants are between ages 55 and 65; nearly half are between 66 and 75; and one in five is 75 or older.

The ReServe individualized placement process engages both ReServists and the partner organizations where ReServists will be placed. This process is briefly outlined below.

- ReServe identifies experienced adults and serves them *as clients* as it works with nonprofits and public agencies to identify appropriate service opportunities. Qualified people are recruited from professional associations, unions, colleges, graduate schools, large corporations, and senior centers.
- ReServe solicits applications and screens client/applicants.
- ReServe works with partner organizations to develop positions useful to the organization and appropriate job descriptions.

<sup>10</sup> [www.ReServeinc.org](http://www.ReServeinc.org) This ReServe *Elder Service* website includes access to the detailed program materials and the 2007-08 ReServe annual report which details the project, highlighting the diversity of partner organizations and ReServist roles, as well as budget information.

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- ReServe orients client/recruits to issues of working with full-time staff and understanding an organization’s culture.
- ReServe assigns a site coordinator who trouble shoots and assists the partner organization.
- ReServe evaluates relationships to ensure positive outcomes for both the volunteer client and the partner organization.
- Once ReServist clients are placed, ReServe maintains its relationship with the partner organization and ReServist to ensure the relationship remains effective and mutually satisfying.
- The stipend—\$10 an hour—is central to ReServe’s success. “This stipend has turned out to be very important,” Claire Altman, executive director of ReServe, says. “ReServe has created a payroll service that handles hourly payrolls and fringe benefits. Most ReServists work 10-15 hours per week with the Partner Organization.”

*When money changes hands...there’s a sense of responsibility....The \$10 stipend isn’t based on any skill level, everybody from secretaries to neurosurgeons receive the same amount.*

Altman, ReServe Director

**ReServe -Challenges and Advice.** ReServe has faced challenges. One of the greatest has been convincing nonprofits of the advantages of hiring skilled, older workers, Altman says. She’s encountered ageism and resistance from “nonprofits not used to using part-time people and not very open.”

She tries to overcome resistance by meeting with concerned people, helping them design appropriate jobs and sending them “really good people.” Another interesting challenge Altman cites is the need for older workers to develop better computer skills. Fortunately, most people are willing to learn and are referred to programs that can help them build those skills.

Asked about her advice about placing retirees in jobs, Altman says, “Establish strong relationships with the local, nonprofit community and help break down the ageism. Tell them older people can see the big picture and work effectively. You can get people at below market cost who can contribute a lot to the organization without having to add full-time staff.”

### Experience Corps

*Experience Corps*<sup>11</sup> is the signature program of Civic Ventures<sup>12</sup>. *Experience Corps* engages people over 55 with young children in their communities. Today, in 20 cities

<sup>11</sup> [http://www.experiencecorps.org/about\\_us/index.cfm](http://www.experiencecorps.org/about_us/index.cfm)

<sup>12</sup> Civic Ventures is a think tank and an incubator, generating ideas and inventing programs to help society achieve the greatest return on experience

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across the country, 2,000 Experience Corps members tutor and mentor elementary school students who are experiencing difficulties in learning to read. Six of the twenty Experience Corps Programs target service to young children in grades kindergarten to three.

Independent research shows that Experience Corps boosts student academic performance, helps schools and youth-serving organizations become more successful, and enhances the well-being of the older adults in the process.

Moreover, independent research has identified the motivations, successes, and supports experienced by Experience Corps volunteers. Forty three volunteers in urban elementary schools were interviewed. The main study findings included:

In qualitative interviews 40 Experience Corps volunteers offered three main reasons for volunteering:

- *A strong personal belief in the importance of helping others.* Many people in the sample linked the desire to volunteer with religious and moral convictions, while others said examples set early in life by family members were a source of inspiration. Still others were motivated by early educational and career experiences linked to service.
- *The chance to improve the quality of their own lives.* Many Experience Corps volunteers were seeking meaningful activities in retirement- they felt that their work with children had provided that for them. Program stipends, received by three quarters of the sample, were appreciated by participants, and for some, were an important source of financial support. Several volunteers said that work with the Experience Corps was a welcome reprieve from loss, loneliness or the stresses of caring for ailing loved ones.
- *A good fit with volunteers' interests and availability.* Experience Corps members were drawn to the program's mission of helping children learn and found the flexible volunteer hours and accessible service locations attractive. They also appreciated the fact that they needed only interest and basic literacy skills to apply. The program provided the training, supervision, and logistical arrangements they would need to succeed.



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Experience Corps members said that they were challenged and invigorated by the demands of teaching young children to read. As volunteers, they gained:

**Volunteers enjoyed children's progress, learning about literacy, and new friendships.**

- *A sense of meaning and purpose* from seeing “their” children progress, experiencing children’s thoughtfulness and believing that they were contributing to the well-being of future generations.
- *Mental engagement* that stemmed from the rewards of learning about new things, such as the mechanics of teaching reading and the art of forging relationships with youngsters.
- *Social engagement* that came from developing new friendships and social networks with other volunteers.

Experience Corps volunteers identified several important program supports. These supports built volunteers’ confidence and skills as well as facilitated the volunteers’ feelings of connection with their school and other volunteers:

- Initial and ongoing training, and day-to-day support and guidance from a site coordinator.
- A full- or part-time site coordinator at each school. Some schools shared coordinators who “floated” among several schools. Coordinators served as a liaison between volunteer teams and Experience Corps administrators and school personnel. The coordinators made sure volunteers knew about upcoming Experience Corps events and school schedules and saw that volunteers completed basic administrative tasks, such as signing in each day and documenting their time with students.

Coordinators also organized Experience Corps classrooms, making sure children’s books and curricular resources were in place. They assigned volunteers to classrooms after discussion with teachers and contacted teachers when a volunteer was going to be absent.

- Team environments of 5 to 15 volunteers within each school site enabled volunteers to forge collegial relationships and support one another throughout the school day.
- Supportive school communities. Volunteers noted the great value of reading specialists and teachers’ guidance about instructional strategies as well as individual children’s needs. Supportive principals made volunteers feel welcomed and appreciated.

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- Flexibility is balanced with commitment. Flexibility in service was identified as an important aspect of the program. Experience Corps offered volunteers a range of commitment levels, from to full-time to only four hours a week. Volunteers also could select their schools based on their needs and interests. Flexible weekly schedules were balanced by the requirement that individuals *sign on for a full school year*.
- Program stipends of \$200/month are intended to defray the day-to-day costs of volunteering. But at least six of the 43 interviewed volunteers viewed Experience Corps as a part-time job because it provided needed income. Five volunteers said that without the stipend, they would leave the program in search of other paid part-time work. Others noted that if not for the financial incentive, they would simply volunteer fewer hours—participating perhaps once a week, rather than two or three days. In this capacity, the stipend attracts and secures an exceptionally stable corps and appears to be a linchpin to the program’s success.

***Flexibility in weekly schedules and school assignments is balanced with commitment to serve for a full school year...***

Portland’s Metropolitan Family Service (MFS)<sup>13</sup> hosts Oregon’s only Experience Corps program. Since 1997, the MFS Experience Corps program has engaged adults 55+ to help Portland area public school students who are having trouble learning to read. Participants tutor elementary school students one-on-one and in small groups, helping them to develop fundamental literacy skills so they can succeed in school and in life.

### Senior Corps

Senior Corps<sup>14</sup> connects people over 55 with the people and organizations that need them most. Senior Corps is a program of the Corporation for National and Community Service, an independent federal agency created to connect Americans of all ages and backgrounds with opportunities to give back to their communities.

- Senior Corps assists older people to become mentors, coaches or companions to people in need, or contribute their job skills and expertise to community projects and organizations.

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<sup>13</sup> For information on the MFS Experience Corps program, contact: Holly Williams, Lead Program Coordinator, [hollyw@metfamily.org](mailto:hollyw@metfamily.org) (503)249-8215 x19

<sup>14</sup> <http://www.seniorcorps.gov/>

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- Senior Corps currently links more than 500,000 Americans to service opportunities in nonprofits, and faith-based and other community organizations throughout the United States.
- Volunteers receive guidance and training so they can make a contribution that suits their talents, interests, and availability. All volunteers within the Senior Corps programs receive pre-service orientation, training from the organization where they serve, and supplemental accident and liability insurance while on duty.

Three Senior Corps programs are:

- The Foster Grandparent Program connects volunteers age 60 and over with children and young people with exceptional needs. Volunteers mentor, support, and help vulnerable children. Foster Grandparents serve up to 40 hours per week. Foster Grandparents receive pre-service orientation, training from the organization where they serve, and supplemental accident and liability insurance while on duty. Some volunteers may qualify to earn a tax-free, hourly stipend.
- The Senior Companion Program brings together volunteers age 60 and over with adults in their community who have difficulty with the simple tasks of day-to-day living. Companions help out on a personal level by assisting with shopping and light chores, interacting with doctors, or just making a friendly visit. Senior Companions serve up to 40 hours per week. Some volunteers may qualify to earn a tax-free, hourly stipend.
- The Retired Senior Volunteer Program (RSVP) connects volunteers age 55 and over with service opportunities in their communities that match their skills and availability. From building houses to immunizing children, from enhancing the capacity of non-profit organizations to improving and protecting the environment, RSVP volunteers put their unique talents to work to make a difference.

Because of the potential relevance of these programs to the Foundation's interests, focus group and key informant interviews included representatives from ReServe, Experience Corps, Foster Grandparents, and RSVP.