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Multnomah County Internal Vital Aging Workgroup

Recommendations Report March 2008

Table of Contents

| | |
|---|---|
| ∞ | Executive Summary |
| ∞ | Introduction |
| ∞ | Needs Analysis – What the Numbers Tell Us..... |
| ○ | A Look at the Workforce |
| ○ | Voluntary Retirements |
| ∞ | Defining a Process |
| ○ | History |
| ○ | Workgroup Selection Process |
| ○ | Workgroup Participants |
| ○ | Topic Experts and Other Invited Individuals and Organizations |
| ○ | Charter |
| ○ | Website..... |
| ∞ | “Best Practices” Research |
| ∞ | Recommendations |
| ∞ | Suggested Plan of Action |
| ∞ | Appendices |
| ○ | Exhibits |
| ○ | Website Links |
| ○ | Suggested Reading |

Executive Summary

On November 14, 2007, Metlife Mature Market Institute released its report “Searching for the Silver Bullet: Leading Edge Solutions for Leveraging an Aging Workforce.” Its author, Dr. David Delong also wrote *Lost Knowledge: Confronting the Threat of an Aging Workforce* and works as a research fellow at the MIT Age-Lab. The report explores what organizations are proactively doing to meet the challenges posed by an aging workforce. The study includes in-depth case studies about four companies and offers creative suggestions for responding to a significant demographic shift. An estimated 77 million “Baby Boomers” will soon enter retirement and the nation’s median age will rise dramatically.

The report begins, “Like it or not, the most ‘predictable surprise,’ of the early 21st Century is that a major retirement wave is about to hit most industrialized countries.” It clarifies that when large numbers of Baby Boomer begin to retire in the next two to five years, many institutions will find themselves scrambling to respond to continue achieving business results and strategic objectives.

Multnomah County, as an employer, will soon be experiencing its own retirement wave given that 23% of its current employees are 55 years of age or older. This percentage is expected to grow over the next ten to fifteen years, particularly in the Library, Health, Human Services, Community Justice and Management departments of the County.

The Multnomah County internal Vital Aging Workgroup convened in August 2007 and represents a diverse team of County employees of differing ages, job positions and ethnicities. The group explored options for establishing Multnomah County as an older adult and retiree-friendly workplace with a focus on engaging and retaining older workers through the use of flexible work arrangements. These include “bridge” retirements, phased retirement programs and options that encourage the creative engagement of older workers as teachers and mentors. All the lessons learned are described in the MetLife report.

The recommendations in this report reflect the beliefs that initiatives that work best for older workers are also:

- ∞ Successful in retaining employees of all ages
- ∞ Effective management practices
- ∞ Enriching for the whole work environment

As the MetLife report cautions, there is no quick solution, but rather a series of opportunities for organizations to seize in order to remain vibrant, competitive and well prepared to meet the future.

Introduction

In February 2007, the Multnomah County Board of Commissioners adopted a resolution to create a Task Force on Vital Aging. It resolved to convene this group in order to “assess and identify new opportunities, best practices, barriers and recommendations for enhancing the independence, engagement and contributions of older adults in Multnomah County and our region.

Three distinct workgroups emerged from this process – An Employment Workgroup, A Civic Engagement Workgroup and an internal County Vital Aging Workgroup. The groups were given the task of developing recommendations for recruiting and retaining older workers, volunteers and retirees in the private and public sectors. They were also charged with submitting these recommendations to the Task Force and County Commissioners for review by the end of March 2008.

This report focuses on the work of the internal County Vital Aging Workgroup that we will now refer to in this report as “The Workgroup.” The Workgroup enthusiastically set to work to provide a series of recommendations developed throughout the course of eight months. The recommendations are intended to enrich the workplace, create opportunities for older and younger workers and inspire other organizations to action.

In addition to the recommendations submitted, the Workgroup also produced a page on the County’s internal website (MINT) listing industry resources. This includes information from the National Association of Counties (NACO), among other well-respected leaders such as AARP.

The Workgroup acknowledges that this is a process that requires commitment from all levels of the organization, development of a well thought-out plan and a firm vision for change that will benefit the current and future generations of Multnomah County workers.

The report that follows includes recommendations and a suggested action plan for achieving these goals.

Need Analysis

The Human Resources Quality and Analytics Unit, within the Department of County Management (DCM) provided data on regular permanent full and part-time employees as of October 2007.

Table 1 shows the age profile of Multnomah County's workforce. This data shows that:

- ∞ 23% of the overall County workforce is age 55 years or older as of 2007; 60% of the workforce is age 36 to 54 years; and 17% of the workforce is age 35 years or younger.
- ∞ Six of the nine departments have more than 23% of employees who are 55 and older.
- ∞ The Department of County Human Services (DCHS) has 32% of employees age 55 years or older, the highest percentage of all departments.
- ∞ Multnomah County Sheriff's Office (MCSO) has 14% employees age 55 and older, a relatively low percentage, but still includes over 100 employees in this age range.

Table 1: Age profile of Multnomah County workforce

| Department | Less than 35 years | | 36 to 54 years | | 55 years and older | | Totals |
|-------------------|---------------------|--------------------------|---------------------|--------------------------|---------------------|--------------------------|-------------|
| | Number of Employees | Percentage of Department | Number of Employees | Percentage of Department | Number of Employees | Percentage of Department | |
| DA | 74 | 34% | 117 | 54% | 27 | 12% | 218 |
| DCHS | 79 | 13% | 340 | 55% | 199 | 32% | 618 |
| DCJ | 74 | 14% | 326 | 63% | 120 | 23% | 520 |
| DCM | 55 | 10% | 335 | 63% | 143 | 27% | 533 |
| DCS | 31 | 15% | 131 | 64% | 44 | 21% | 206 |
| HD | 167 | 18% | 527 | 57% | 226 | 25% | 920 |
| LIB | 115 | 21% | 294 | 55% | 142 | 26% | 551 |
| MCSO | 150 | 19% | 524 | 67% | 105 | 14% | 779 |
| Non-Departmental | 17 | 22% | 38 | 50% | 21 | 28% | 76 |
| Countywide | 762 | 17% | 2632 | 60% | 1027 | 23% | 4421 |

Key to acronyms

DA = District Attorney

DCHS = Department of County Human Services

DCJ = Department of Community Justice

DCM = Department of County Management

DCS = Department of Community Services

HD = Health Department

LIB = Library

MCSO = Multnomah County Sheriff's Office

Table 2 shows length of service as related to retirement projections. This data shows that:

- ∞ Employees age 55 years and older who have 20 or more years of service have a higher likelihood of seeking retirement.
- ∞ Health, DCM, and the Library have the most employees who are age 55 years and older with 20 or more years of service.
- ∞ Age and length of service are only two components that help estimate potential retirement. Estimates are limited because circumstances for each employee vary widely. There are multiple examples where the above assumption is not the best predictor of retirement. For instance, employees age 70 or older with no desire to retire; employees with 40 or more years of service with no desire to retire; employees who are eligible to retire with 30 years of service, but are under age 55 years; and employees with only 10 years of service and at age 58 years are ready for early retirement.
- ∞ Do not overlook employees age 36 to 54 years who have 20 or more years of service; they may be closer to seeking retirement than anticipated.
- ∞ In combined age ranges, there are approximately 598 employees who have 20 or more years of service, with significant numbers in MCSO, Health, Library, and DCM.

| Table 2: Length of service related to retirement projections | | | | | | | |
|--|-------------------------|-------------------|-------------------|-------------------------|-------------------|-------------------|-------------|
| Department | Executive & Management | | | Represented Employees | | | Totals |
| | 55 years and older | | 36 to 54 years | 55 years and older | | 36 to 54 years | |
| | 10 to 19 yrs of service | 20 yrs of service | 20 yrs of service | 10 to 19 yrs of service | 20 yrs of service | 20 yrs of service | |
| DA | 2 | 3 | 2 | 6 | 9 | 22 | 44 |
| DCHS | 15 | 2 | 4 | 86 | 20 | 16 | 143 |
| DCJ | 11 | 6 | 10 | 46 | 33 | 14 | 120 |
| DCM | 9 | 8 | 11 | 35 | 35 | 31 | 129 |
| DCS | 3 | 2 | 8 | 12 | 16 | 19 | 60 |
| HD | 23 | 17 | 12 | 81 | 27 | 36 | 196 |
| LIB | 7 | 9 | 7 | 34 | 31 | 45 | 133 |
| MCSO | 4 | 5 | 16 | 34 | 28 | 90 | 177 |
| Non-Departmental | 10 | 3 | 1 | 1 | 0 | 0 | 15 |
| Countywide | 84 | 55 | 71 | 335 | 199 | 273 | 1017 |

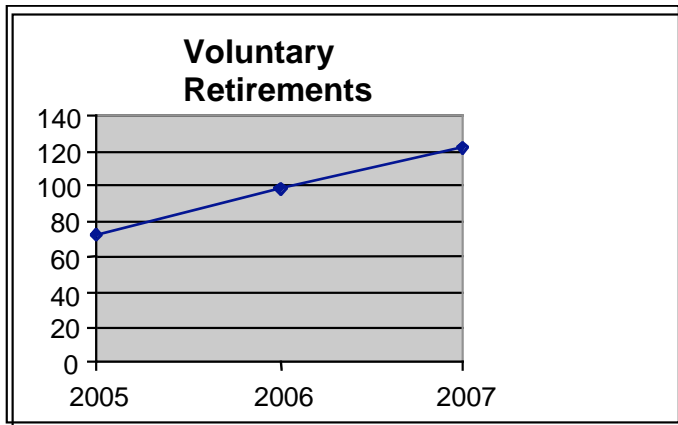
Human Resources Quality and Analytics also looked at the County workforce by classification and age to see what job positions will most likely be impacted by retirements.

Table 3 shows that a significant percentage (40% or higher) are found in several classifications. One classification crosses all departments and several others are specific to certain departments.

| Table 3: Job positions most likely to be impacted by retirements | | | | | |
|---|-------------------------------|---------------------------------|---------------------------------|-------------------------------|---------------------------------|
| Executive & Management | | | Represented Employees | | |
| Classification | Number of Employees 55+ years | Percent of total classification | Classification | Number of Employees 55+ years | Percent of total classification |
| Program Manager 1 | 20 | 40% | Community Health Nurse (HD) | 70 | 40% |
| Program Supervisor | 19 | 23% | Office Assistant 2 | 62 | 25% |
| Program Manager 2 | 15 | 35% | Library Clerk (LIB) | 42 | 28% |
| Community Justice Manager (DCJ) | 14 | 33% | Office Assistant Senior | 42 | 29% |
| <i>Other positions have only 1 to 4 employees in each.</i> | | | Case Manager 2 (DCHS) | 32 | 27% |
| | | | Corrections Officer (MCSO) | 31 | 8% |
| | | | Mental Health Consultant (DCHS) | 31 | 27% |
| | | | Librarian (LIB) | 30 | 42% |
| | | | Probation/Parole Officer (DCJ) | 24 | 21% |

Voluntary Retirements

There was an increase in voluntary retirements within Multnomah County from 2005 to 2007 as evidenced by the graph below.



In the Beginning – Defining a Process

During the summer of 2007, Multnomah County employees received notification of an opportunity to participate in the Workgroup. Over 100 management and non-management staff responded to this invitation. On August 1, 2007, Raquel Aguillon was hired by DCM to serve as project manager for this and other special assignments. One of the first tasks identified was the selection of a diverse pool of County staff to serve on the Workgroup. The project manager in consultation with the DCM Director identified a diverse pool of staff from management and non-management positions, representing various departments, diverse races, geographic job sites and varied ages, including retirees. With the approval of the DCM Director, nineteen staff members were selected and invited to participate in the Workgroup. The Workgroup members along with the departments they represent are listed in the Appendix A. The first Workgroup meeting was held on August 30, 2007. County Chairman of the Board, Ted Wheeler, kicked off the meeting with an official welcome and appreciation.

At this meeting, the group reviewed its objective, identified a work process, plan and timeline. One of the first duties was the development of a charter to clarify the goals, responsibilities and objectives of the Workgroup (Appendix B). The Workgroup identified themes and information needed in order to carry out its work. With this in mind, a variety of experienced industry professionals, subject experts and union officials were invited to join in on the aging workplace discussions (Appendix C).

In order to accomplish the duties outlined in the charter, Workgroup members brainstormed resources needed in order to educate themselves on the topic of an aging workforce. This included the identification of industry professionals, as well as other stakeholders who were then invited to meet with the group. The topics covered included a lengthy discussion on PERS, current benefit packages and other human resources related topics. Linda Weiner, a workforce expert for Monster.com and an aging workforce business consultant added insightful information and vision for the group's project. Additionally, union leaders were invited to share in dialogue about potential changes. Workgroup members also received invitations to hear Kara Getz, attorney for Gordon Smith who is on the Senate Select Committee on Aging, a presentation titled "Boomer or Workforce Bust," at which PCC President Preston Pulliams spoke and a forum at which AARP national President Bill Novelli and PSU Institute on Aging Director Margaret Neal spoke (Appendix D).

On October 25, 2007 a forum dubbed "Share Your Thoughts" was held at the Kaiser Permanente Town Hall Ballroom. The main objective was to create a venue for interested employees to provide input on the recommendations as they were being developed. Employees unable to attend the forum were given the opportunity to submit their thoughts electronically.

Researching Best Practices

In mid August 2007, the Workgroup created a webpage on the MINT to track industry best practices, articles and resources on the topic of a mature workforce. This resource, originally intended to provide Workgroup members with a central clearinghouse of information, is now available to inform Multnomah County employees. Plans are being developed to move the information to the County's public website for other government agencies researching best practices. The page includes links to multiple agencies conducting research and providing services to older adults including AARP, the National Institute on Aging and the National Academy on an Aging Society. The National Association of Counties (NACO) offers a specific section on its webpage highlighting this work.

Specific to the recommendations set forth in this report, the Workgroup found several best practices proven to be successful in the industry. In California, retired state employees with an interest in going back to work part-time can now register their interest by adding their name to a database known as "Boomerang." This collaborative project is the product of various state agencies who work together to maintain the site and make it available to state workers. Employees register and use a password to enter their information for hiring managers to preview. Another program utilizing a similar strategy is the University of California Berkeley Retirement Center's Retiree Work Opportunities Program, a web-based way to connect retired faculty and staff to campus hiring managers who have a variety of temporary hiring needs.

Telecommuting, also known as teleworking in some sectors, is gaining popularity according to the work of Gartner Dataquest which conducts research in this area. It is estimated that 12 million telework employees telecommute more than eight hours per week, up from about 6 million in 2000. It is estimated that by 2009, 14 million workers will not be driving into the office.

Agencies of the federal government have an entire section in its human resources manual dedicated to telecommuting, including policies and procedures.

Louden County in the state of Virginia has a comprehensive telework program with specific telework policies and procedures, agreement forms, and a self-certification home safety checklist.

Specific Recommendations for Fiscal Year 2009

Overall goal:

Multnomah County will be a model governmental employer of older adults in recruitment, retention, management, training and development of its policies and procedures. By promoting older adults as vital resources within its own departments, Multnomah County will encourage similar efforts among other community stakeholders including businesses, philanthropic organizations, government agencies and community groups.

1. Promote Flexibility

The County Chair and Department of County Management will:

- Communicate to all County managers and employees that the **County values flexibility*** in work arrangements whenever possible. *Flexible work arrangements need to work for the County and the employee.*
- Develop a **policy encouraging flexibility*** in all departments. Flexibility can include schedules, specific tasks, hours per week, and days of the week, job sharing and “bridge” phased retirement.*
- Develop and encourage use of a County **telecommuting policy.*** Telecommuting allows for remote work to be accomplished anywhere at anytime. Technology enables work to be carried out in “non-traditional” work locations.
- Increase the use of **limited duration positions** for special projects or grants with time-limited funding.

2. Improve Recruitment and Retention of Older Workers

The Department of County Management will:

- Develop an information tool to **inform employees about existing County opportunities.*** The County should implement methods to communicate effectively about all work opportunities (management, supervisory, line, on-call and temporary) to retirees and older workers in the community.
- Create a **database of retired County employees*** (listing skills, languages, abilities, interests and volunteer work) for Human Resources to access, as well as posting jobs (temporary, on-call, part-time, full-time, project based and volunteer) in one place.
- Create a “**welcome back**” **information packet** to reinforce value of returning workers and to assist in orientation.

3. Adapt Compensation and Benefits

The Department of County Management will:

- Develop consistent and comparable **pay scales and benefits*** for part-time, on-call and temporary positions whenever possible.
- Provide **comprehensive life planning for pre-retirees** that includes financial planning and other life transition considerations for later years.

- Provide **monthly bus passes or books of bus tickets** to all Multnomah County employees, including temporary and on-call employees.
- Explore **other incentives**, such as sabbaticals, longevity bonuses and increased annual vacation accrual to ensure that skills of older employees are harnessed.

4. Provide Training and Mentoring

The Department of County Management will:

- Provide **training for managers** on how to use flexible work arrangements while continuing to meet their goals and objectives. This will require that managers be open to using creative and innovative approaches.
- Include **training on multigenerational issues** as part of the County diversity efforts.
- Develop a **formal mentoring program** that utilizes all age groups to mentor each other and specifically uses retirees who can share knowledge and experience.
- Develop training for managers on how to incorporate a discussion of an employee's future career plans into the **performance appraisal process**.

5. Strengthen a Multigenerational Workforce

- Create an **internal affinity group (an employee network group)** on the opportunities and challenges of a multigenerational workforce

*identified as a high priority of the Workgroup

Other Recommendations:

1. Centralize Resources

- Identify **one central point of contact in the County** that can be a link for citizens who may want to directly volunteer for the County and for any County manager who may need a volunteer.
- Multnomah County Aging and Disability Services (ADS) will develop a ***Healthy Aging Resource Directory***. The directory will be available on the ADS website and provide information about programs, classes and a wealth of topics related to healthy aging. For those who do not have access to the Internet, ADS Helpline and District Center staff can provide assistance, and printed materials will be published to inform residents about healthy aging resources in their neighborhoods.

2. Ensure that County Customers Include Older Adults

- Expand **programming and outreach by Multnomah County Library** for older adults. For example use one of “Everyone Reads” campaigns on a book about different generations and their interdependence on each other.
- Develop and strengthen **existing intergenerational approaches** of human service programs the County directly provides and/or funds throughout its departments.

Suggested Plan :

Overall Goal: *“Multnomah County will be a model governmental employer of older adults in recruitment, retention, management, training and the development of its policies and procedures.”*

| Recommendation | Suggested Plan Steps |
|---|--|
| Promote Flexibility ➤ Flexible schedules ➤ Bridge – phased retirement ➤ Telecommuting ➤ Limited duration positions | <ul style="list-style-type: none"> ▪ Executive support ▪ Review of current County policies ▪ Research data and agreements with unions ▪ Develop and/or revise County policies ▪ Adopt County policies ▪ Departments identify positions with flexible schedule opportunities ▪ Implement |
| Improve Recruitment and Retention of Older Workers ➤ Information tool to promote County resources and opportunities ➤ Database ➤ “Welcome Back” packet | <ul style="list-style-type: none"> ▪ Executive support ▪ Create cross-department workgroup ▪ Explore innovative and creative ways that departments can use older adults/retirees ▪ Consult with external sources – see industry best practices models for creating template ▪ Create information tool, database, welcome back packet ▪ Implement |
| Adapt Compensation and Benefits ➤ Consistent and comparable pay scales and benefits for part-time, on-call and temporary ➤ Comprehensive life planning for pre-retirees ➤ Monthly bus passes or bus tickets – all employees ➤ Other incentives | <ul style="list-style-type: none"> ▪ Executive Support ▪ Salary structure & benefits short and long term assessments for current employees & external hires ▪ Review County policies ▪ Develop and/or revise County policies ▪ Adopt County policies ▪ Communicate new structure ▪ Implement |

Note: bold items show Workgroup priorities.

| Recommendation | Suggested Plan Steps |
|--|--|
| <p>Provide Training/Mentoring</p> <ul style="list-style-type: none"> ➤ Management training ➤ Training on multigenerational issues ➤ Create mentoring program for all ages | <ul style="list-style-type: none"> ▪ Executive support ▪ Create cross-department workgroup ▪ Research and identify trainings & mentoring opportunities |
| <p>Strengthen a Multigenerational Workforce</p> <ul style="list-style-type: none"> ➤ Affinity group | <ul style="list-style-type: none"> ▪ Create cross-department workgroup to investigate interest/development of affinity group (County interest group for older adults) ▪ Follow executive rule to form affinity group ▪ Expand networks within older adult networks – i.e. AARP on how to best serve this population |
| <p>Centralize Resources</p> <ul style="list-style-type: none"> ➤ Central contact point for volunteers | <ul style="list-style-type: none"> ▪ Executive support ▪ Investigate one central point of contact for prospective volunteers ▪ Investigate cost ▪ Implement |
| <p>Ensure that County Customers Include Older Adults</p> <ul style="list-style-type: none"> ➤ Expand outreach and programming by Multnomah County Library | <ul style="list-style-type: none"> ▪ Assess statistics of older adults served ▪ Evaluate where improvement is needed ▪ Implement expansion efforts |

Appendices

Appendix A: Workgroup Members

- ◆ Bruce Barclay – DCM
- ◆ Julie Bates – DCS
- ◆ Silvia Caballero Fay – DCHS
- ◆ Sharon Chalem – Library
- ◆ Mel Feinstein – DCM
- ◆ Carol Ford – DCM
- ◆ Kathleen Fuller Poe – Health
- ◆ Chocka Guiden - DCHS
- ◆ Susan Haas – Retired from County/Working DCHS
- ◆ Delette Huffman – Retired from County/Working Library
- ◆ Amy Lippay – DCM
- ◆ Darcy Miles – Health
- ◆ Fernando Sanjines – DCHS
- ◆ Gary Simmons – Sheriff's Office
- ◆ Anne Smith – DCJ
- ◆ Wilma Smith – Health
- ◆ Christine Tobkin – DCJ
- ◆ Joshua Todd – Commission on Children, Families and Community
- ◆ Chareundi Van Si – Health

Appendix B: Charter

Purpose: The Workgroup will focus on researching best practices in County employment of retirees, and older adults exploring current organizational practices, identifying obstacles, looking at needs and as an on-going structure to support recommendations, discussing innovative options, and developing a series of recommendations for providing County retirees' opportunities for remaining part of the County workforce.

Core Values:

- ∞ Embracing institutional change that provides expanded opportunities
- ∞ Honoring and practicing diversity
- ∞ Learning together
- ∞ Working as a team
- ∞ Service to the people of Multnomah County
- ∞ Mutual support and respect
- ∞ Professionalism
- ∞ Open communication

Goals:

- ∞ Development of recommendations to Multnomah County by way of the Employment / Vital Aging Taskforce.
- ∞ Development of a "structure" to support the on-going needs of the aging workforce
- ∞ To achieve these goals through:
 - Learning about current employment practices
 - Identifying obstacles discouraging interested retirees from remaining active members of the County workforce
 - Identifying "best practices" in employment, government institutions and other industries for retaining people at retirement age
 - Thinking creatively, outside of the box, and to be open to new approaches

Governance of the Workgroup:

- ∞ The decision-making process will be consensus. Time-crucial decisions or those on which consensus cannot be reached will be made by the Workgroup sponsor
- ∞ The Workgroup will review and edit a list of basic ground-rules to best serve the needs of the group
- ∞ The Workgroup will offer recommendations to the Vital Aging Taskforce for submission to the County Board of Commissioners who will have decision-making authority.

Sponsors: Ted Wheeler, Lorenzo Poe, Carol Ford**Sponsors' Responsibilities:**

- ∞ Eliminate barriers to success for the Team
- ∞ Provide access to resources for the Team

Project Manager: Raquel Aguilon**Project Manager's Responsibilities:**

- ∞ Arrange meeting logistics and inform Workgroup
- ∞ Develop agenda and incorporate Workgroup recommendations
- ∞ Facilitate group discussions
- ∞ Facilitate information to group on an on-going basis
- ∞ Help identify key areas of focus
- ∞ Research and present best practice information
- ∞ Drafting of charter template for Workgroup input
- ∞ Drafting of ground rules for Workgroup input
- ∞ Drafting of Workgroup's recommendations to go to the Vital Aging Taskforce
- ∞ Serve as Workgroup point person for communications, questions, etc.

Workgroup Members as listed above:**Individual Members' Responsibilities**

- ∞ Actively support goals of the Workgroup as a whole
- ∞ Make a commitment to attend all meetings
- ∞ Punctuality at meetings so group starts and ends on time
- ∞ Active participation
- ∞ Learning from information presented in timely manner in order to make informed decisions (reading emails, attachments, research articles, information presented)
- ∞ Work on subcommittees when needed
- ∞ Honor ground-rules, charter, timeline, and work of group

Participation:

- ∞ The members will serve from date appointed: August 2007 thru the completion of the Workgroup project estimated at March 2008 or when recommendations have been completed.
- ∞ If a person decides to resign from group or misses three consecutive meetings, the project manager in consultation with the Workgroup sponsor may appoint a replacement to fill the Workgroup term.

Meetings

- ∞ The Workgroup will meet one time per month for 2 hours from 8:30 – 10:30am
- ∞ The Workgroup will meet on the last Thursday of the month (as per schedule below)
 - ❖ August 30, 2007 Multnomah Building – Boardroom Conference Room
 - ❖ September 27, 2007 Multnomah Building Rm #380
 - ❖ October 25, 2007 Kaiser Permanente Town Hall Ballroom (regular meeting 8:30 – 10:30 then “Share Your Thoughts,” forum with 70+ other County staff 11:00 – 12:15)
 - ❖ November 29, 2007 Multnomah Building Rm #380
 - ❖ December 13, 2007 Multnomah Building Rm#625
 - ❖ January 31, 2008 Multnomah Building Rm #380
 - ❖ February 12, 2008 Multnomah Building Cooper Rm#525 (8-10am)
 - ❖ February 28, 2008 Multnomah Building Rm #380
 - ❖ March 27, 2008 Multnomah Building Rm #380

Subcommittees will meet on a frequency determined by the scope and timeliness of their work.

Appendix C: Presenters

| Topic | Presenter |
|--|--|
| PERS | Marsha Ehlers – Multnomah County, DCM, Finance/Risk Mgmt., Payroll/PDT |
| | Melinda Lewis - ING |
| Human resources policies | Travis Graves, Multnomah County, HR Director |
| Labor contracts | Carol Brown, Multnomah County, HR, Senior Labor Relations Manager |
| Workforce statistics | Carla Gonzalez, Multnomah County, HR, Quality & Analytics |
| Employee benefits | Marla Imsland, Multnomah County, Finance/Risk Mgt., Benefits |
| Occupational safety and worker's compensation | Michelle Cross, Multnomah County, Finance/Risk Mgt., Workers Comp. |
| Labor union experts invited to participate in discussions. | Becky Steward, President, Local 88 |
| | Doug Hewitt, Vice-President, Multnomah County Corrections Officers Association |
| | Carol Simmons, President, Oregon Nurses Association |
| Legal Counsel | Kathryn Short, County Attorney's Office |
| Topic Experts | Linda Weiner, Weiner Training and Consulting, Age Issues Expert for Monster.com Trainer, “Adapting to an Aging Workforce” |

Appendix D: Community Presentations

Additionally, Workgroup members attended the following community presentations:

| Topic | Presenter |
|--|--|
| Creating an Age Friendly City – City Club Presentation | Margaret Neal, director of the PSU Institute on Aging and Bill Novelli, national president of AARP - Friday, October 5, 2007 The Governor Hotel |
| Boomer and Workforce Bust | Preston Pulliams, <i>President, Portland Community College</i> Chandra Brown, <i>Vice President, Oregon Iron Works</i> Andrew McGough, <i>Executive Director, Worksystems, Inc.</i> Wednesday, Sept. 19, 2007 Doors open at 7:00 a.m., Program from 7:30 - 8:45 a.m. Where: Governor Hotel, 614 S.W. 11th at Alder |
| Senate Update: Aging Workforce | Kara Getz, Tax Counsel for Senator Gordon H. Smith, Ranking Member of the U.S. Senate Special Committee on Aging. |

Appendix E - Resource Website Links

National Academy on an Aging Society

<http://www.agingsociety.org/agingsociety/index.html>

National Older Worker Career Center

<http://www.nowcc.org/aging/phasedRetirement.aspx>

American Association of Retired People (AARP) - Policy & Research

<http://www.aarp.org/research/>

National Association of Counties (NACO)

<http://www.naco.org/>

PSU Institute on Aging

<http://www.upa.pdx.edu/IOA/>

National Institute on Aging (U.S. National Institute of Health)

<http://www.nia.nih.gov/>

Center on Aging & Workplace Flexibility at Boston College

http://agingandwork.bc.edu/template_index

Aging Workforce News

http://www.agingworkforcenews.com/2007_08_01_archive.html

Vital Aging Network Minnesota

<http://www.vital-aging-network.org/options/index.asp>

United States Senate Special Committee on Aging

<http://aging.senate.gov/record.cfm?id=269837>

Appendix F - Suggested Reading

As boomers age, old is in for many employers

<http://sanfrancisco.bizjournals.com/sanfrancisco/stories/2007/11/26/focus16.html?b=1196053200%5e1554578&surround=et>

Effective Employment practices: California

<http://www.edd.ca.gov/swaorep/swaoemp.htm>

2007 Aging U.S. Workforce Survey: Challenges and Responses - An Ongoing Review

http://mints.co.multnomah.or.us/County_Management/Vital%20Aging/docs/2007_Aging_US_Workforce_Survey.pdf

The Complete Guide to Flexible Working

<http://www.flexibility.co.uk/Guide/Content/Chapter1.pdf>

The Cornell Study of Employer Phased Retirement Policies: A Report on Key Findings

<http://www.ilr.cornell.edu/extension/files/20031219112155-pub1251.pdf>

AARP Retention Strategies

http://www.aarp.org/money/careers/employerresourcecenter/retention/retaining_experienced_workers.html

Mentoring: The Core of a Project for Coping With an Aging Work Force - The Engineering Legacy Project

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