Everyone Matters:

A Practical Guide to Building a Community for All Ages

Report of the Multnomah County Task Force on Vital Aging - 2008

Portland, Oregon

MULTNOMAH COUNTY

Credit: Travel Portland

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INTRODUCTION

It is not all about denying the very real problems associated with aging. It is all about denying the very real potential associated with aging.[1]

-Dr. Gene Cohen

For decades, demographers have been ticking off a litany of problems that communities around the nation will face as a result of the **Baby Boom generation** reaching retirement age. There is no question that such a large cohort approaching this important milestone **raises challenges** around employment, health care, housing and other areas. But an emphasis on a negative view overlooks **major opportunities** that are emerging as well. There is a positive story that needs to be told and this report represents the first chapter in that story.

Too few communities have developed concrete plans to address the problems associated with the aging of the Baby Boom generation. Even fewer have prepared themselves to **capture the significant potential benefits** that will result from this **unprecedented pool of talent and experience**. Only communities that **plan well** will reap these benefits. Multnomah County has been planning for many years through its Aging and Disability Services Division, Health Department and other agencies to address the potential challenges that may arise. **Multnomah County will also be one of the few jurisdictions in the nation** that will also have **a plan to reap the benefits** of this wellspring by carrying out the recommendations in this report. A more complete copy of this report along with numerous links can be found on the Chair's website at **www.co.multnomah.or.us/chair**.

At our recommendation, the Multnomah County Board of County Commissioners voted unanimously on February 15, 2007 to create a Task Force on Vital Aging. The Task Force was charged with **identifying opportunities, challenges, best practices** and **recommendations** for enhancing the **independence, engagement** and **contributions** of older adults in Multnomah County and throughout our region and to **raise our community's awareness** of older adults as a growing resource who do and can contribute even more to our community.

Vital aging is about having the quality, capacity, and opportunity for continuous engagement at an optimum level through one's life cycle. The Task Force chose to focus on the two primary opportunity areas of **employment** and **civic engagement** of older adults. We recognize there are many other important avenues to creating a community for a lifetime and a place where people of all ages can thrive and prosper together. These include but are not limited to affordable **housing,** adequate public **transportation,** accessible and affordable **physical and mental health care**, a dynamic **arts** community, **lifelong learning** opportunities, support for **caregivers,** in-home and long-term **care support** and **public safety** to name just a few. Multnomah County, along with our public

sector partners, the support of the private and philanthropic sectors and individual citizens, will **continue to work on this range of issues**.

We would also like to thank Jay Bloom who staffed the Task Force on Vital Aging and who offered overall leadership to the effort. Of course, we also thank each one of the Task Force members and staff who participated and contributed in some way to this excellent final report. They include:

Arleen Barnett, Vice President of Administration, Portland General Electric
Greg Chaille, President, Oregon Community Foundation
Mark Dodson, Chief Executive Officer, NW Natural
Sho Dozono, President, Azumano Travel
Eileen Drake, Vice President of Administration & Legal Affairs, PCC Structurals
Nick Fish, Attorney, Meyer and Wyse Law Firm
Gillian Floren, Vice President of Marketing, Greenlight Greater Portland
Joyce Furman, Community Leader
Jerry Hudson, Trustee, Collins Foundation
Pam Knowles, Chief Operating Officer, Portland Business Alliance
Carol Nielsen-Hood, Director, Gresham Chamber of Commerce
Preston Pulliams, President, Portland Community College
Dan Saltzman, Commissioner, Portland City Council
Harold Williams, Board Member, African American Chamber of Commerce
Jay Bloom, Task Force Staff, President, Bloom Anew

We also want to thank the chairs of the workgroups, Joyce DeMonnin, Andy Nelson, Judy Strand and Raquel Aguillon and all of the individuals who contributed to the workgroups. Each is appreciated for his or her contributions. We greatly appreciate support from the underwriters of this report: **AARP Oregon, Portland Business Alliance, Portland Community College** and the **United Way of Columbia-Willamette**.

Our colleagues on the Board of County Commissioners – Jeff Cogen, Lisa Naito and Lonnie Roberts - have all earned our gratitude for their willingness to support research in this critical, emerging area. We appreciate their continued commitment to the needs of people of all ages in our community.

The primary audiences for this **report are employers, public policy makers** and the **philanthropic** community, including both **funders** and **nonprofit** organizations. We expect each of these groups will find some helpful and stimulating ideas. We believe individual readers will also gain from reading this report since all of us want to age vitally.

Key themes in this report:

- o The **average age** of our local population and workforce is **increasing**.
- o This will lead to significant **challenges for all employers** in the public, private and non-profit sectors.
- o Fortunately, the vast majority of adults **want to work** and **stay engaged** in our community as they grow older.
- o Area employers and nonprofits will have to **proactively** create **new approaches** and **change attitudes** if we are to effectively engage this new significant community resource.
- o **Old models will have to be updated** and retooled and old assumptions and stereotypes "retired."
- o Harvesting this significant new resource **requires leadership** in **planning**, identification of **achievable action steps** and **leveraging** the unique contributions of government, business, philanthropic organizations, nonprofit agencies and the larger community.
- o The changes needed in the workplace and civic organizations to engage older adults are **very similar to those desired by the younger generation**. Adapting models to include older workers **will also help attract and retain younger adults** as well.

This process further highlights the role of Multnomah County as a **convener, partner** and **catalyst** for effective **collaboration** between government, business, philanthropic and nonprofit organizations and other community groups to achieve public purposes.

This report is by no means the "final answer" about how to best capture all the benefits of projected demographic changes in the years to come. It does, however, provide Multnomah County with **concrete strategies** that we would be wise to work to adopt. We hope this report will be a **call for action** for further **innovation** and **creativity** going forward and provide a **practical guide** to building a community for all ages, one that values the **interdependence** of all our generations. **Imagine** a community where "**Everyone Matters**."

TED WHEELER

Ted Wheeler,
Multnomah County Chair

Maria Rojo de Steffey

Maria Rojo de Steffey,
Multnomah County Commissioner
District 1

BACKGROUND

The rapidly graying of America will fundamentally change our culture and present us with some of the most critical policy issues of our times.[2]
   – PAUL HODGE, GENERATIONS POLICY PROGRAM, HARVARD UNIVERSITY

We often hear about the "Baby Boomer" generation. Who are these "Baby Boomers" and why should we care? Born largely between 1946 and 1964, Baby Boomers now range in age from 44-62. They are our aging population and their numbers are far greater than any previous older generation. Adults age 44-62 currently number **78 million**, up from just **43 million** in 1980.[3] Oregon's demographics are consistent with this trend.

This **increase in the number of aging adults** may raise concerns among some, but it also provides us with **extraordinary opportunities**.[4]

This generation of older adults will be the **healthiest**, most **educated**, most **skilled** and most **affluent** in history. Aging adults have the knowledge and skills to contribute to our communities. They have also indicated a fervent desire to continue to actively participate in society through **employment** and **civic engagement**.[6]

Projected Growth in Older Population in Multnomah County[5]

Oregon Gray Matters, a report commissioned by Portland Community College and published by AARP Oregon, found that Oregon shows signs of a state entering the "**longevity revolution.**" These are states in which active aging is predicted to impact the workplace and postsecondary education as older workers return to school for recareering needs. From 2001 to 2005, the number of workers 55 and older increased from 205,097 to 264,930. The labor force participation of workers 55 and older rose from 36% to 45%.[7]

The Portland area is nationally recognized as a bell weather state that anticipates and prepares for societal shifts. This **call to action** is another example of a pioneering effort to harness the capacity and address the needs of our aging population. A recent survey of over 10,000 local governments asked about their preparedness for an aging population. The survey found that only 46 percent of American counties have even begun to address the needs of the rapidly increasing, aging population.[8] Public policy makers, employers, nonprofit organizations and both public and private funders have the opportunity right now to pursue innovative and effective strategies to engage our aging adults.
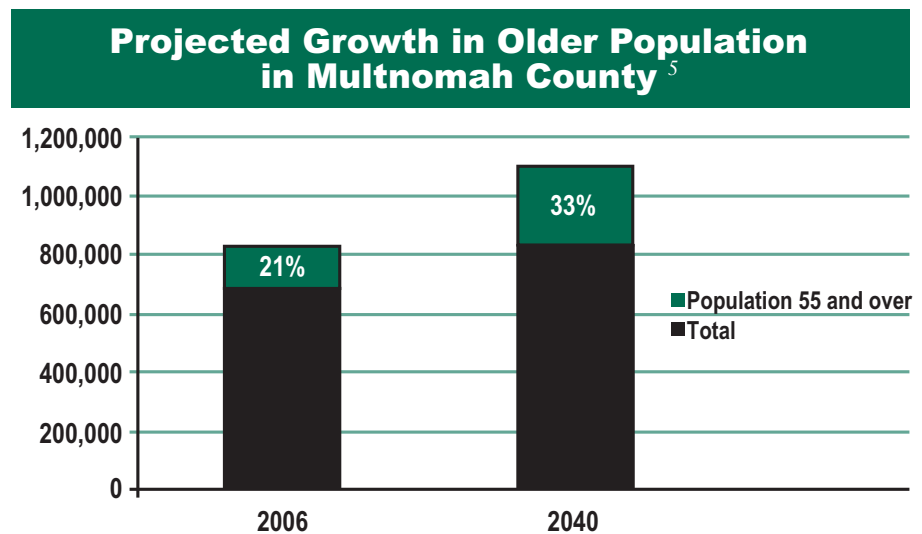
Increasingly, reports describe **workforce shortages** of talented and experienced workers and the impact this will have on the public, private and nonprofit sectors. Not only do older adults want to work in future, they want to work in ways that benefit the community and the next generation. They also want more options in how they work. It is to our benefit to identify practices that will provide the desired flexibility while drawing on this vast supply of skill and knowledge.

"Ageism" is discrimination or prejudice against people of a particular age. Ageism is most evident against older adults and can be found in our workplace policies, the media and our culture generally.

Some view older adults as a **growing liability rather than a dynamic asset.** Warnings of Social Security bankruptcy, runaway Medicare costs and excessive demands on long-term care reflect a belief that older adults are a costly burden rather than critical, contributing members of our communities.

70%
of older adults **will want to work** in some capacity in their later years.

42%
want second careers where they can share or **pass on their knowledge** to others.

58%
of adults ages 50 to 70 years old would consider taking jobs now or in the future to **benefit their communities.**

78%
of these individuals are interested in working to **help the poor,** the **elderly,** and other **people in need.**[9]

There is an increased demand for flexibility and work-life balance not only among older workers but also among younger workers. Creating a flexible and rewarding workplace for older adults will make those businesses and organizations more attractive for employees of all ages.

KEY ASSUMPTIONS

- CENTERS FOR DISEASE CONTROL AND PREVENTION

Vital Aging: We intentionally chose the term **"vital aging"** to reflect that older adults can be creative, productive, successful and healthy. *Aging does not mean disability. Aging is not a disease.* With increased attention to diet, exercise, alcohol intake, smoking, lifelong learning, work and civic engagement our aging population will be the healthiest in history. Even when aging adults have a disability, there are still opportunities for a vital, active life.

Older Adults are a Resource: Older adults represent a growing resource with considerable expertise, experience and available time for work and service to the community. All older adults have value and are capable of meaningful contributions to our community.

Older Adults Pass on Knowledge: Older adults should have opportunities to transmit their skills and knowledge for the benefit of future generations of employees.

New Attitudes, Practices and Policies Are Needed: We must build on the strengths of older adults and give them the opportunity to contribute in a meaningful way.

Active Adults Remain Independent: The more actively engaged older adults are, the more likely they will remain independent and the better their quality of life. They may also be in lesser need of public and private services as they age.

Working Adults Generate Income: Older adults who work longer earn more personal retirement income, pay taxes and continue to contribute to Social Security.

Employment and Civic Engagement Are Critical: We have focused this report on employment and civic engagement as two critical avenues for vital aging.

What's good for older adults is good for the whole workforce: Young, talented individuals are seeking out workplaces that offer the same kind of flexibility and work-life balance that is needed to maintain and attract older adults.

"Have you given much thought to what kind of job you want after you retire?"

EMPLOYMENT

We are pushed by pain until we are pulled by vision.[11]

— REVEREND MICHAEL BECKWITH

Workforce Shortage and Knowledge Loss

The Bureau of Labor Statistics projects a **shortfall of 10 million workers** in the United States by 2010.[12] Older adults are a critical part of the solution, both because of this shortage and also because of their substantial knowledge.

43 percent of the U.S. labor force will be eligible **to retire between 2004 and 2012,** impacting the public, private and non-profit sectors. Moreover, for **every two workers exiting** the workforce **only one may enter.**[13]

Industries in Oregon with some of the oldest workforces are:[14]
* Utilities
* Education
* Nonprofits
* Real Estate
* Healthcare
* Government
* Manufacturing

Projected Change in Number of Workers between 1980 and 2010[15]
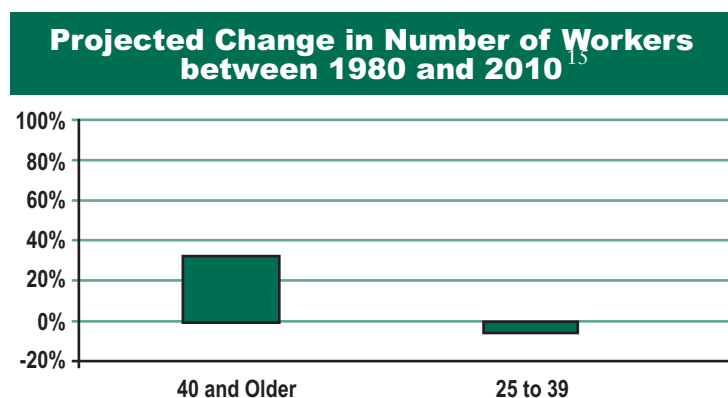
The impact will be felt in staffing, but also in financial statements and operational issues. Organizations should identify the impact these workforce shortages will have and how older workers can help to mitigate these gaps. Only 36% of Oregon employers say they have taken steps to prepare for an aging workforce.[16]

The impending gap is not only in numbers but also in available skills.

There is business value that is uniquely derived from experience, making it an asset that can't be replaced simply with technical knowledge or know-how.[17]

This includes loss of knowledge, skills, efficiency, loyalty and relationships. The 2007 report "Will Oregon Have Enough Workers," notes that as Baby Boomers retire, one of the primary challenges will be finding individuals with the right combination of skills and experience to replace them.[18]

Relationships that make the work more efficient and more effective are lost. These include networks inside and outside the organization, including relationships with vendors, customers, funders, donors and regulators.

Developing recruitment and retention practices that are friendly to older workers can limit these losses dramatically. The competitive edge and future success of our businesses, nonprofits and public organizations is closely aligned with efforts to recruit, retain, retrain and re-engage older adults.

This chart illustrates the stages of pain an organization may experience as their workforce ages. Organizations will find themselves in different stages of feeling "the pain."

Where's the Pain? [19]

Continuum of Pain

8 It's a national crisis

7 Our whole sector is facing shortages in many fields

6 There just aren't enough...[fill in occupation]

5 Other employers around here have same problem

4 Our organization is about to lose a lot of experienced folks

3 Some units may be facing future staffing problems

2 Where's our next generation of leaders?
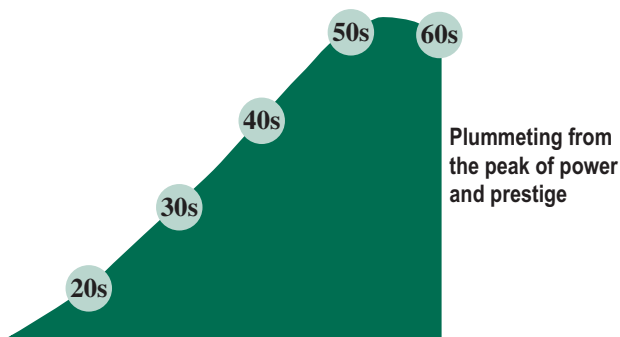
1 Who can replace old Joe?

© 2004 Dr. Mary B. Young marybyoung@aol.com
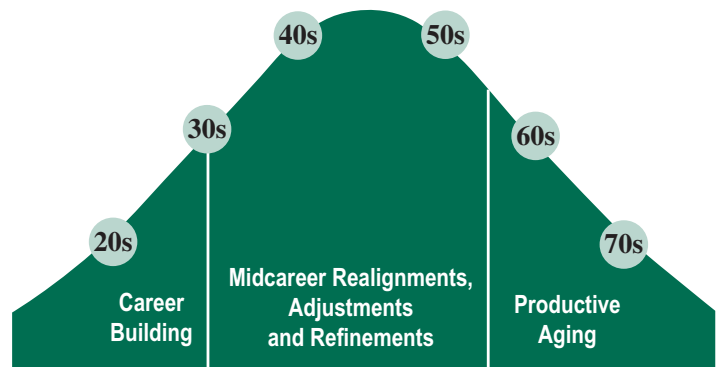
What Older Employees Want

Because the boomer demographic is so large, any generalization will be imperfect. But we do know that **these older adults will age very differently** than previous generations due to their health, educational attainment level, work histories and personal motivation. Studies repeatedly show that the "Baby Boomers" have **no intention of seeking a traditional retirement**.[20]

The **old model of obtaining education, working and then retiring** is waning. It is being **replaced by cyclical patterns**, with individuals moving in and out of workforce, educational and leisure activities. For many, retirement will **no longer mean to withdraw**, disappear and wind down to full-time leisure. Rather, it will mean **new beginnings**, continued **engagement, productivity** and **contribution** over twenty, thirty or forty years.[21]

Traditional Retirement Profile [22]

50s
60s
40s
30s
20s

Plummeting from the peak of power and prestige

Productive Aging View

40s
50s
30s
60s
20s
70s

Career Building

Midcareer Realignments, Adjustments and Refinements

Productive Aging

Source: *Retire Retirement, Rekindle Career, Retain Talent* by Dychtwald, Erickson and Morison. 2005

71% percent of older adults feel that work is part of an ideal retirement.[23]

The top reasons for continuing to work (other than for money) are the desire to:[24]	Some older adults will have the financial means to choose whether to work. But a **majority** of older adults **will probably have to work** to supplement Social Security support and retirement savings.[25]
87% Stay **mentally active** **85%** Stay **physically active** **77%** Continue to be **productive** **66%** Maintain **health benefits**	Workers **age 55 to 59** who say that the **need for income** is a primary reason to work: **72%** Workers **age 60 to 65** who say that their **need for income** is a primary reason to work **60%**

Older workers want:
- **Meaningful work** that contributes to the community and to others
- **Flexibility** in work schedules, assignments and location
- **Options** to allow for work/life balance

Most people don't retire because they want to stop working, but because they want more control over their time, for health reasons or for family obligations. Many want to ease into retirement, have more freedom, deal with less stress or simply want a change. Flexibility and options will continue to be key for this generation of workers as it will for younger generations of workers. Offering options will provide a positive return for organizations.

Employers report these **benefits from engaging older workers:**

- Reliability
- Problem solving skills
- Informed judgment
- Long-time experience

- Ability to manage crises
- Sense of responsibility and loyalty
- Established networks
- History of working with diverse people

Employer Best Practices

The following best practices allow organizations to approach the aging of their workforce pro-actively rather than waiting for a crisis. Many organizations and leaders are resistant to addressing new trends and making critical changes even if they will ultimately benefit the organization and its employees. But there are great opportunities to engage older adults and in doing so, ensure greater success for your organization.

Strategic Analysis:[26]

Figure 1: Forecasting and Planning for Future Retirement-Related Talent Deficits
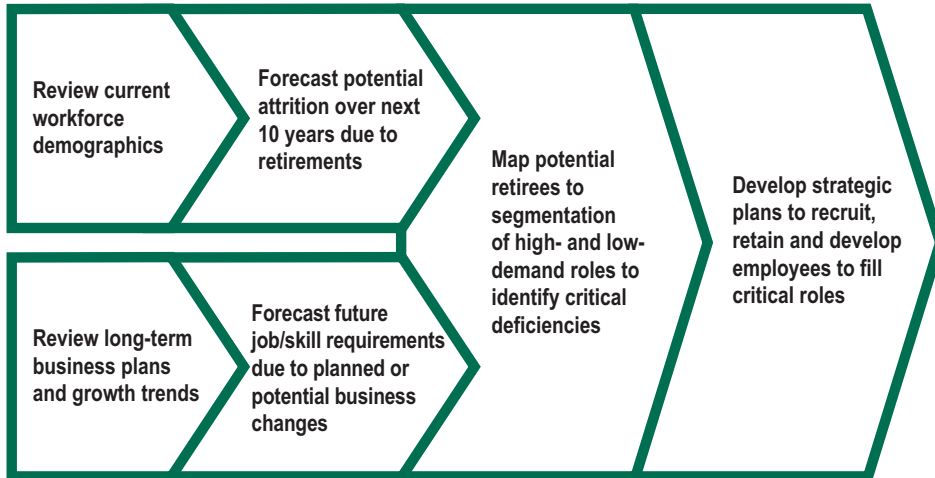
Best practices:
- Strategic analysis
- Recruitment
- Work environment and design
- Flexible working arrangements
- Compensation and benefits
- Knowledge transfer, mentoring and training
- Multi-generational workforce training

Ask Critical Questions: Does age in your workforce matter given your strategic goals? What percentage of your workforce is approaching retirement? Do you have a future workforce in the pipeline with the requisite skills and experience to meet your goals?

Conduct An Internal Sustainability Workforce Audit: Focus on the age of your workforce, what departments or positions are most vulnerable to knowledge or experience loss, where replacing workers will be difficult, whether key positions have internal candidates ready for succession. Locally, Portland General Electric assesses risk by unit, position and type of risk (retirement, retention, labor market availability and knowledge transfer). They use an annual staffing and development process for each business unit.

Once vulnerable positions, functions or departments have been identified, organizations can take steps to **create back-up resources** and **institute knowledge transfer strategies. This should be part of an overall strategic workforce planning process.**

Recruitment

- **Partner with organizations** that help older workers find jobs.

- **Maintain a job bank** of retired and former employees who may be interested in filling positions, participating in projects, or promoting openings.

- **Supplement recruiting packages** with materials designed for older workers.

- Ensure the organization's web site and recruitment **materials reflect images** of an age-diverse workforce.

- Use **positive language** and supplement factual information with an emotional message.

- Identify **experience as a plus** or **mature judgment preferred** in job ads.

- Use **age-diverse interview panels**.

- Design **interview questions** that encourage candidates to share their skills and experience.

- **Eliminate barriers** by reducing restrictions on post-retirement employment.

- Create an **intermediary organization** that can help you recruit like "Your Encore.com."

- Create **internships** for older workers.

Workplace Design

- Ensure that work facilities, equipment and processes are **safe and ergonomically sound,** and assist employees of all ages. Provide ergonomic adjustments as necessary.

- Ensure that workplace **lighting is adequate**.

- Ensure that **floor surfaces** are flat and stairs meet building codes.

- Set **computers** in a physically appropriate location.

- Design jobs to **avoid continued repetitive duties** by cross training and rotating employees in repetitive motion jobs.

- Encourage **regular stretch breaks**.

- Provide **training** on back care and safety.

Organizational Culture that Supports Manager and Supervisor Readiness

Workers of all ages generally don't leave organizations, they leave their supervisors. Therefore, it is important to invest in training for managers and supervisors so they can provide the experience that will retain and cultivate their workforce.

- **On-going coaching** for supervisors and managers is most effective, helping to **reinforce periodic trainings** and remind managers that accommodating the new workforce is a key element of the organization's **recruitment and retention strategy**.

- Develop an **individual agreement** with each employee to define **expectations** regarding the pace and speed of their **career advancement**, implications for the employee's schedule, compensation and **potential** for promotional opportunities.[27]

> **Key Principles:**
> - Any new work design must work for both the **organization and the employee**.
>
> - Any new work arrangement should be **conditional**, approached explicitly as **temporary**, and **revisited** periodically to ensure success and mutual satisfaction.

Work Design

The old work model of the industrial age was designed for an individual to work full-time, five days a week, fifty-two weeks a year. Newer work design models allow for more creativity, flexibility and choice. Increasingly, organizations are offering work in different designs:

Episodic or durational assignments allows work to be done for short periods of time or on a project-by-project basis.

Telecommuting allows work to be done outside of the office.

> **Global Trends**
> In Europe, **"interim management"** is a growing trend. Organizations employ former managers on short-term projects from three to six months.
>
> In Spain, **one in three workers** now appears on the payroll as a **temporary worker**.[28]

Bridge jobs allow workers to work seasonally or part-time and may involve changing positions with an organization. Employees may move from a salary to an hourly wage. The goal is to bridge the gap between career employment and complete retirement.

Phased retirement aims to reduce hours and responsibilities for an existing position and potentially, the phasing in of a successor.

Ask older workers what they want and need. Don't make assumptions.

Flexible Working Arrangements

59% of workers age 50 and older would like to remain in the workforce if they could **reduce their hours** or **have flexible hours**.[29] While compensation is important, many workers, especially older ones, report that flexibility is key in their decision to continue to work.

The following are varying types of flexible work arrangements that employers can consider. What they share is that they allow flexibility in:
- Scheduling of work hours
- Number of hours
- Location of work
- Compensation

Individual employees may move in and out of such arrangements over time. A guide to flex-options can be downloaded at www.we-inc.org/flexguide.pdf.

Three Stages in Approaching Flexibility:
- Flexibility is focused simply on its **benefit to the organization**.

- Flexibility **policies are written** particularly to attract and retain employees. **Usage is low** and often handled on an **ad hoc** basis, risking perceptions of unfairness.

- **Flexibility is the rule** rather than the exception. Organizations not only recognize the increased productivity or service, but also **want their workforce to have as many options as possible** in order to stay healthy and vital.[31]

Compensation and Benefits

To attract and retain workers, employers might consider providing:
- **Compensation and benefit policies**, including retirement pensions, that promote part-time or reduced work schedules and at the very least, do not restrict or create unnecessary barriers to these arrangements.

Employees who have greater flexibility, report higher levels of **job satisfaction**, stronger **commitment** to the job, higher levels of **engagement** and better **health**.[30]

Flextime: Employees have flexibility in start and end times, maintaining the same number of hours each day.

Compressed work week: Employees work longer hours on some days and shorter hours on other days in that same pay period.

Part-time: Employees work less than full-time.

Job sharing: Two or more employees share one full-time position.

Telecommuting: Employees work from a remote location.

Internships: Employees learn skills as an "apprentice."

Episodic: Employees work intermittently as needed, on-call or as a back-up or substitute.

Project/Durational: Employees work on time-limited assignments.

- **Health benefits** to a greater portion of workforce, regardless of number of hours worked.

- **Long-term care insurance.**

- **Short and/or long-term disability insurance.**

- **Retirement savings incentives** such as a matching 401K contributions, profit sharing or stock options.

- **Elder care and care giving support.**

- **Tuition, professional development and lifelong learning support.** Older workers often need training to learn new skills and promote themselves.

- **Diverse training** that incorporates multiple learning styles and adult learning principles which may include classroom learning, distance learning, individualized training, coaching, internships or apprenticeships.

- **Travel reimbursement** and public transportation vouchers.

- **Wellness trainings** that include health screenings, nutrition guidance and internal fitness programs or discounts on fitness memberships.

- **Internal volunteer programs.**

- **Retiree associations** providing opportunities for continued engagement and connection.

- **Non-monetary forms of compensation** as described in the nonprofit section of this report.

Retirement and Life Planning

One benefit being offered by some organizations is life planning for pre-retirees and sometimes, their partners. Weyerhaeuser has been providing this service since 1986. Providing life planning and retirement seminars may help explain your organization's retirement and Social Security benefits and introduce employees to the idea of planning for other aspects of their later years. Providing this service for current employees

nearing retirement can serve a variety of purposes:
- **Employee** is better prepared for retirement.
- **Employer** may obtain critical information about an individual's plan for retirement.
- **Employer and employee** can begin to talk about possible options.

Many employees are anxious about retirement and the uncertainties it will bring in role identity and economics. Anxious workers are generally more distracted and less productive. Helping employees plan for this significant life transition can lessen their anxiety and help them **make better decisions** about how and when to retire or re-career.

It is in the organization's best interest to have more satisfied and prepared retirees whether as ongoing ambassadors for their organization or as a future workforce resource.

Knowledge Transfer/Mentoring/Training

Workers age 50 and over are more likely to have **remained with one organization** or in the **same field longer** than the younger generation.[32] Employees who are able to work at organizations for long periods of time are more likely than short-term employees to **accumulate job-specific critical knowledge** around business operations, organizational culture, best practices and technological changes and adaptations. This is what we consider "**institutional memory**."[33]

Organizations can mine this critical knowledge and experience through formal mentoring and training programs. Mentoring can occur on an informal basis, but more successful mentoring efforts are more formal. Here are some tips for designing an effective mentoring program in your organization:

- **Screen effectively** for those individuals have the skills and temperament to be a mentor. Not everyone does.

- Mentors need upfront **training and ongoing coaching**.

- Before meeting a mentor for the first time, **employees should analyze their own objectives** and learning styles. The best mentoring programs have identified specific skills and knowledge to be transferred.

Life by Design Northwest (lifebydesignnw.org) provides life planning **in the greater Portland metropolitan area** and is available for employers, their employees and the public at large. The initiative was launched by:

- AARP Oregon

- Express Personnel

- Hands On Greater Portland

- Morrison Child and Family Services

- Multnomah County Library

- Northwest Natural

- Oregon Public Broadcasting

- Portland Community College

- Portland State University

- Arrange meeting times, locations and frequency to **accommodate both parties** and **cultivate a personal connection**.

- Recognize opportunities for "intergenerational" mentoring or "**mutual**" mentoring so that both parties can learn from each other.

- Assure older employees that they are **not working their way out of a job** by teaching skills to younger employees.

An added benefit of a formal mentoring program that matches older with younger workers is that it can reduce biases and myths that both parties may have. Interaction between workers of different ages can ease awkwardness, tensions and help everyone realize that all generations have something to offer the workplace and to each other.

Multi-generational Workforce Training

Organizations that **want to respect and cultivate diversity** among their employees are increasingly adding **age as another key element** of a diverse workforce. Such efforts can **reduce stereotypes** and **improve inter-generational communication** in the workplace.

> **One-fifth of employed adults** today are **older than their bosses.** This percentage is **expected to grow dramatically** in the years ahead.[35]

Only 16% of organizations have prioritized **demographic issues** in their training.[34] In recent years the term "cultural competence" has emerged, which suggests a knowledge of multiple cultures, styles and needs in order to be successful with diverse staff, customers and organizational partners. "**Generational competence**" would begin to encourage organizations and their employees to understand, appreciate and meet the specific needs of different generations.

What is it like to be supervised by someone the age of your son, daughter, niece or nephew? What is it like to supervise someone the age of your parent? Organizations need to initiate discussions about generational differences and perspectives and form teams that deliberately include members of varying generations. Multi-generational management is in its early stages and our capacity and capabilities in this area will surely grow in the future.

It's like the 1970s, when women were streaming into the workplace. Employers who paid attention and changed their policies to be friendly to women had a powerful edge. The same thing is going to happen as boomers age. There are great opportunities for employers who can make their policies diverse enough to accommodate everyone.[36]

-DEBORAH RUSSELL, DIRECTOR OF ECONOMIC RESEARCH, AARP

CIVIC ENGAGEMENT

Community service or volunteering through nonprofit and charitable organizations is a very common pursuit in the United States and contributes significantly to our overall quality of life here in Multnomah County and throughout our state.

Volunteering happens most often informally, without involving any organizations. All cultures and ethnic groups value helping their neighbors. One can argue that care-giving of any type is a form of civic engagement. We need to acknowledge the work that older adults do for others as valuable. Women, in particular, deserve respect for their daily care-giving.

Caregivers contribute billions of dollars to society in the form of unpaid work.[37] We need to recognize and reward these efforts. We must also acknowledge other forms of civic engagement, including **serving in a public office**, serving on **public commissions** and **advisory boards**, **voting** and other forms of **public advocacy**. There are other intermediary groups, such as faith communities, fellowships, service clubs and various neighborhood organizations that contribute to the community's well-being and can leverage the aging individual's desire for community involvement and meaningful work.

For purposes of this report, we have chosen to focus on civic engagement through nonprofit organizations.

The Unique Case for the Nonprofit Sector

The nonprofit sector has many reasons to care about our aging population, particularly given its **size, educational** and **skill level, good health** and **relative wealth**. The boomers will have the **money, expertise, desire** and **time** to engage in community work through nonprofit organizations. The Portland metro region **ranked number** six in the country for **volunteer rates** of civic engagement.[38]

The aging of boomers will affect the nonprofit sector workforce as well as its **donor base, volunteer corps, advocacy capacity** and **direct service** demand.

> Adults age 45 and older account for **77% of financial assets** in the United States, control **70% of total wealth** and account for more than **half of the nation's discretionary spending**.[39]

There is a potential labor market that could meet people's desire for a sense of purpose and a hope of making a contribution to something larger than themselves. I see a potential movement, an intersection of the practical assets of work with the higher purpose assets of service.[40]

   -MARC FREEDMAN ENCORE- FINDING WORK THAT MATTERS IN THE SECOND HALF OF LIFE

As with other sectors, the nonprofit sector has begun to experience **a shortage** of line workers, middle management and upper managers. This shortage will only grow in coming years.[41]

Two-thirds to three-quarters of the executive directors of nonprofits plan to leave their jobs in the next five years.[42] Between **2007 and 2016**, nonprofit organizations **will need to attract** a total of **640,000 new senior managers**, 2.4 times the number currently employed. This is the equivalent of recruiting more than **50 percent** of every MBA graduating class, at **every university** across the country, **every year** for the next **ten years**.[43]

However, **attracting and retaining a workforce based on financial compensation in the nonprofit sector is almost an oxymoron**. The cost of living in most of our communities for housing, transportation, health care and child care, has significantly outpaced social sector financial compensation. There are exceptions, but as a rule, the vast majority of nonprofit organizations have not kept up with yearly inflation increases during the past twenty years, and this is not likely to change in the near future.

Close to **nine in ten nonprofit** organizations that **recruited employees** for professional and administrative jobs during the past year found the task to be **"somewhat" or "extremely" challenging**.[44] Fewer **college students** are majoring in the social sciences as opposed to business, law and computer science. College students are carrying ever increasing educational debt, a significant financial barrier to working in the nonprofit sector.[45]

Nonprofits can expect even more fierce competition from the private and governmental sectors for a decreasing number of available young workers in the years ahead. Along with other employers, nonprofits are **increasingly putting the burden for health insurance costs** and **retirement savings** onto the employee, exacerbating the problem of limited compensation.

But if nonprofits choose to compete for the older workforce, they have some **critical challenges**. The **best practices** identified earlier in this report for employers are applicable to nonprofit employers as well.

One-third of boomers volunteer and have the **highest volunteer rate of any group.**[46]

There are other opportunities in nonprofits besides a typical paid position. One nonprofit, ReServe, recruits and places older adults in other nonprofits and pays a stipend equivalent to $10 an hour for up to 15 hours a week. The positions include senior management and middle management as well as line positions.

Nonprofits need to broaden their view of older workers, whether paid or unpaid, to see them as **significant assets,** a kind of donor to their organization and mission. There is the potential value for **millions of dollars worth of work in unpaid hours and work at discounted pay rate**s.

Conceptually and practically it is important for nonprofits to develop a continuum of work and compensation options.

CIVICVENTURES
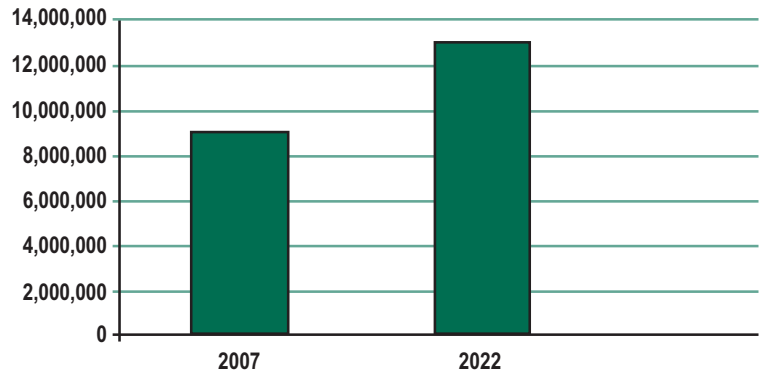
THE NEXT CHAPTER: REAPING THE EXPERIENCE DIVIDEND [48]

THE SPECTRUM OF SERVICE AND WORK OPTIONS

OCCASIONAL, UNPAID
COMMUNITY VOLUNTEERING

ONGOING, PAID
COMMUNITY SERVICE WORK

Options	Episodic, informal volunteering	Episodic formal volunteering	Ongoing formal volunteering	Sustained intensive service	Part-time public service employment	Fulltime public service employment
Commitment & Compensation	Occasional Low level commitment No organized volunteer structure	Intermittent One-time commitment Organized volunteer structure	Regular 2-5 hrs/week over 6-12 months/year Possible expense reimbursement	Ongoing 10-15 hrs/week 9-12 months/yr Stipend Transportation or meal expenses Insurance	Part-time 16-32 hrs/week Wages or salary Possible employee benefits	Full-time 40 hrs/week Salary or wages Health benefits Other employee benefits
Examples	Helping neighbors Friendly visiting	Special events Short-term projects	Mentor Tutor Coach Hospital aid Museum docent	Stipended service programs in: •Education •Caregiving •Youth services	Nonprofit or public agency worker Childcare worker	Teacher Nurse Nonprofit manager Social entrepreneur

What Older Adults Want from Civic Engagement

Older adults have a variety of reasons for civic engagement, from **using their skills and experience** and continuing to **feel productive**, to maintaining **social interaction** and leaving a **positive legacy**.

Returnment – the act of giving or returning in some small way what the world has given you, especially as an alternative to retirement.[49]

- JAY C. BLOOM

There are a number of challenges, however, for nonprofits to effectively engage older adults. Older adults often **prefer to use their professional skills** and experience rather than do general labor. But most nonprofits do not have the capacity to utilize the experience and skills of the large numbers of adults who will potentially want to engage in this sector.

As in paid work, older adults are **looking for flexibility in their civic engagement** as well. Short-term, episodic work for example, may be attractive to many older adults. **Options** that include **minimum wage, stipends** or **working for health insurance benefits** may also be inviting to older adults.

The challenge for the nonprofit sector is to move away from preconceived notions about what a job should look like, to craft jobs that fit both the goals and needs of the people occupying them and those of the employing organization.[50]

-DR. PHYLLIS MOEN

For those older adults who do not need financial compensation, there are a number of forms of compensation, incentives and benefits that nonprofits can promote and actively utilize. These can include the opportunities to:

- Employ their **skills, expertise, wisdom**

- Learn **new skills** for personal interest or future paid employment

- Meet **new and diverse people** and gain exposure to new cultures

- Work on a **team**

- Give back to the community, **make a difference**, leave a legacy

- Receive **recognition** and appreciation

- Feel needed and have a **purpose**

- Work in **different kinds of roles** ranging from board member, senior or middle management, program staff

- Have **new experiences**

- Maintain a **flexible schedule** with episodic work

- Obtain **mentoring or training**

- Receive **recognition** in an annual report, newsletter, certificate or event

- Receive a **reference** for potential future paid employment

- Work in an environment where **employee opinions matter**

- Receive a discount for a service, product or admission to an organization

- Increase **mental and physical health** by staying engaged

- Maintain a **structure** to daily life

- Expand **network** through meeting other staff, board members or individuals who work with the organization

- **Connect previous career** with the next life stage

- **Create balance** between leisure and work

- Volunteer or **work alongside a spouse, partner or family member**

Nonprofits will benefit by keeping these motivations in mind as they design promotion, recruiting and retention efforts.[51]
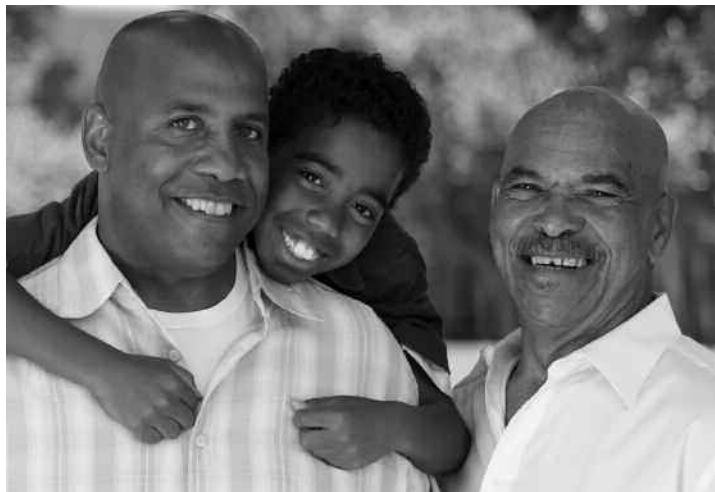
CHALLENGES/BARRIERS

Every day, people have problems for which they do, in fact, have the necessary know-how and procedures. We call these technical problems. But there is a whole host of problems that are not amenable to authoritative expertise or standard operating procedures. They cannot be solved by someone who provides answers from on high. We call these adaptive challenges because they require experiments, new discoveries, and adjustments from numerous places in the organization or community.[52]

-RON HEIFETZ, MARTIN LINSKY, LEADERSHIP ON THE LINE

In addition to employing best practices, there are adaptive and **attitudinal changes** that need to occur. These changes may actually be more difficult to address. To date, most aging policy, literature and services are largely **focused on aging as a period of declining function** and **withdrawal from social engagement**. This is changing, but very slowly. **Stereotypes are common**, ranging from a belief that older workers are ill more often, to the idea that older workers are less flexible and adaptable than younger workers. **Age discrimination is alive and real.**[53]

HOW BUSINESSES PERCEIVE OLDER WORKERS [54]

AARP asked 1,000 executives whether they agreed with some commonly perceived advantages and disadvantages of older workers:

Advantages	Percentage who agreed
Experienced	91%
Knowledgeable	78%
Ability to mentor other workers	71%
Valuable insights into customer or business needs	63%
High level of engagement in their work	37%
High productivity	23%

Disadvantages	Percentage who agreed
Uncomfortable with technology	52%
Inflexible	49%
Difficulty reporting to younger supervisors	44%
Risk of health problems	30%
Lower productivity	18%
Unwilling to be a team player	14%

SOURCE: AARP

BETSY BOCK/Staff Artist

Other **attitudinal barriers** include the belief that:

- There are **enough younger people** available to work full-time.

- We have to treat everyone the same and that **customizing agreements** with individual employees is inherently **unfair and unjust**.

- Such adaptations are **too time-consuming**.

The workplace is becoming filled with more generational, economic and lifestyle diversity. Consequently, different attitudes and approaches need to be developed.

Participating in diversity training may be an important technical tool, but deeper learning, coaching and real-life experience is needed for adaptive learning to occur and for an individual to become more culturally and generationally competent.

Leadership for technical and attitudinal changes must start from senior leadership and be actively pursued by all levels of the organization, recognizing there will be resistance.

Effective leadership is the capacity to disturb people at a rate they can absorb.[55]

-LEADERSHIP ON THE LINE

Human Resources Focus Must Change: Human resources department must become more focused on strategic workforce development rather than being primarily risk management agents.

Costs Can Be Recovered Over Time: Managing two part-time people rather than one can be more expensive and challenging. However, it is not unlike the initial investment in technology. If done right, the frustrations and upfront costs can be recovered many times over with greater productivity, retention, and job satisfaction.

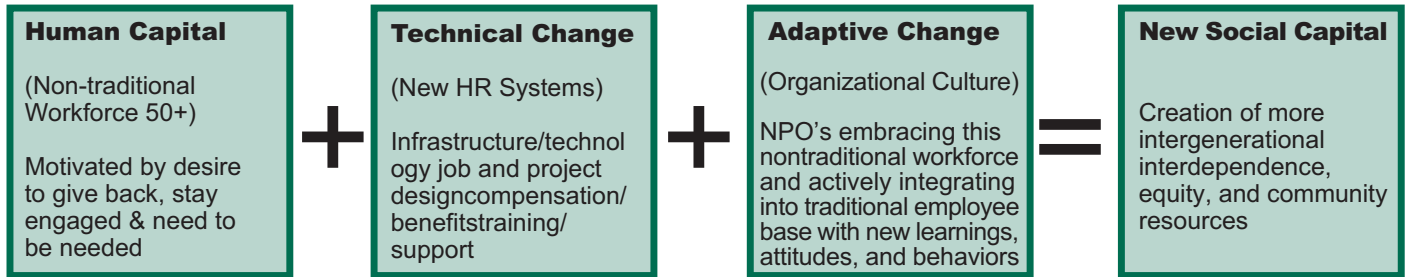Some **common assumptions** nonprofits must challenge:

Older People Want To Work For Market Wages or Just Volunteer: This may be true for some, but many older adults may be willing to work for a lower wage, for a stipend or for some other monetary or non-monetary benefit.

People Want To Work Only In Their Area Of Expertise. While that may be true in some cases, other individuals may also want to try or learn something new.
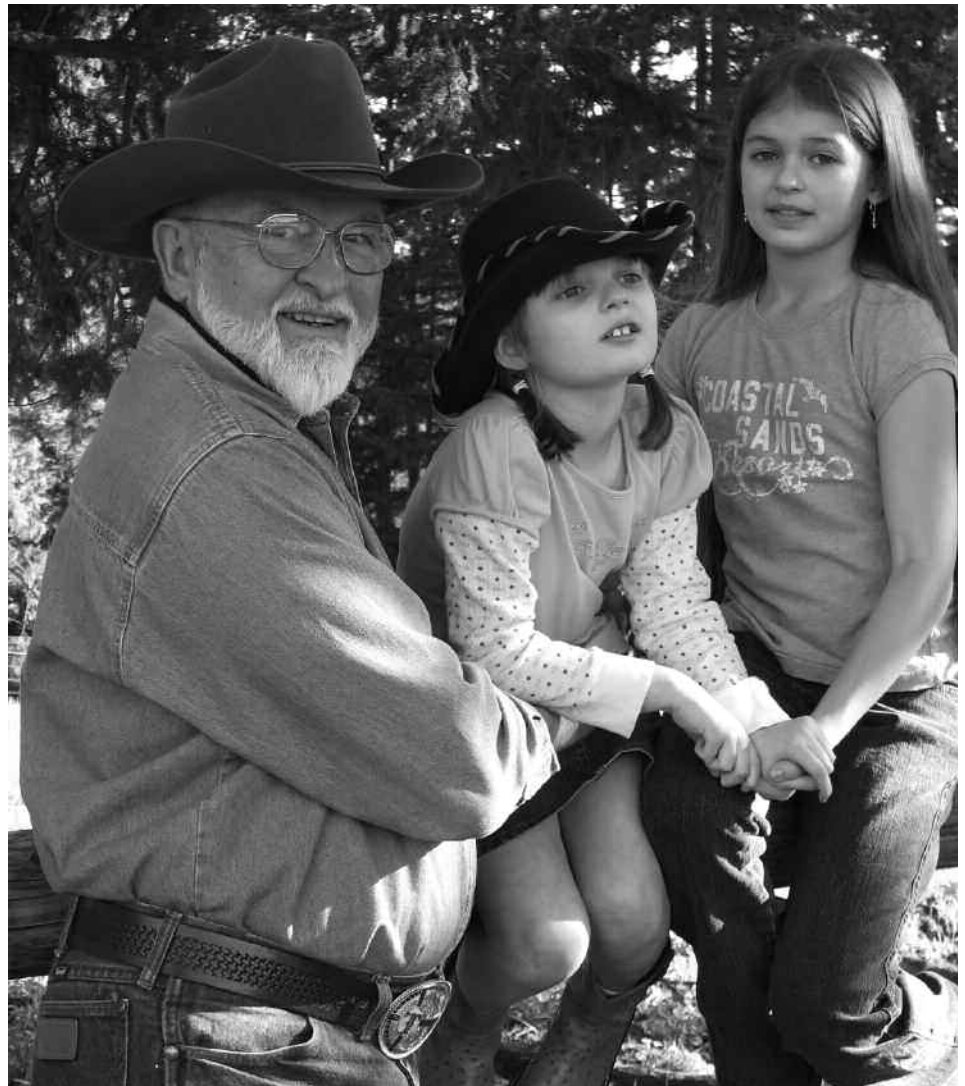
The Costs Are Too Great. Organizations must make investments in infrastructure to effectively recruit, screen, orient, train, support and evaluate the current and new workforce. Managing this new workforce is not unlike investing in fund development; cultivating and securing donors takes planning and resources. Most professional fundraisers acknowledge that it takes money to raise money. Harvesting this growing workforce resource will also take an investment of time and resources.[56]

Given that the vast majority of nonprofits are relatively small, they may need third-party institutions to support these functions and lessen the overall burden for the individual nonprofit organization. All of us should revisit our assumptions on aging and recognize the significant challenges our organizations face.

"Experience making a difference"[57]

Human Capital		Technical Change		Adaptive Change		New Social Capital
(Non-traditional Workforce 50+) Motivated by desire to give back, stay engaged & need to be needed	**+**	(New HR Systems) Infrastructure/technology job and project designcompensation/benefitstraining/support	**+**	(Organizational Culture) NPO's embracing this nontraditional workforce and actively integrating into traditional employee base with new learnings, attitudes, and behaviors	**=**	Creation of more intergenerational interdependence, equity, and community resources

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RECOMMENDATIONS

These recommendations for next steps are provided for:
- Employers

- Nonprofit organizations

- Public and private funders

- The community at large

- Multnomah County government

- Public policy makers

Employers: Private, Public and Nonprofit
- Beginning with executive leadership, **publicly and intentionally commit your organization** to full utilization of workers age 50 and older. Reward employees who embrace this commitment and do not tolerate indifference or lack of support.

- Conduct a **workforce sustainability audit** in light of your organization's strategic direction.

- Create **flexible options** for as many workers as legally possible. Toss out that 'one size fits all' in benefits and work arrangements.

- Establish and **cultivate a culture and work environment** that values cross-generational diversity. Combat negative stereotypes of all age groups.

- Proactively **develop knowledge transfer strategies.**

- Conduct **multi-generational training** as part of overall diversity training.

- Support **retraining and development programs** for all workers, giving action to the term "lifelong learning."

- Offer **life planning** for pre-retirees through workshops and/or one-on-one coaching.

- Allow **flex-time** for employees to be able to engage in community projects prior to their retirement.

- The Portland Human Resource Management Association and others could maintain an **ongoing learning community** specifically focusing on best practices for employing older adults.

Nonprofit Organizations

- **Expand language**. Recognize that the lines will blur between volunteers who are unpaid and those who receive a stipend or other forms of compensation. Some volunteers will prefer to have a specific title, such as member, staff, associate, participant, mentor, teacher, advisor, coach, consultant, project manager, coordinator, or by specific function such as designer, clerk or discussion leader. Where appropriate, use functional descriptors for these positions.

- **Pay the upfront costs**. Engaging unpaid individuals does cost time, money and requires effectively investing in infrastructure and systems to manage this resource well.

- **Assign management of unpaid staff to professional volunteer managers** with attention to job and project descriptions, orientation, training, supervision and evaluation. Where appropriate, ensure that the volunteer management function is fully supported by human resources, rather than fund development offices.

- **Strengthening the volunteer management function** through staff participation in Northern Oregon Volunteer Administrators Association (NOVAA), training and other professional development opportunities.

- **Organize and sponsor regular nonprofit work fairs**. Potential sponsors: Life by Design, Elders in Action, Idealist.org, Nonprofit Association of Oregon, Hands on Greater Portland.

- **Don't assume that money is the number one motivation** for older workers wanting to work in the nonprofit sector. There are many other compelling reasons individuals choose to do this work.

- Create **work and compensation options**.

- **Create unpaid staff career ladders** or tracks that allow for advancement.

- Hands on Greater Portland, the Northwest Oregon Volunteer Administrators Association, Metropolitan Family Services, TACS and the Nonprofit Association of Oregon (NAO) should **continue to develop and promote best practices** for engaging older adults on their websites as well as through training, workshops and consultation.

Philanthropic and Public Funders

- Provide **funding for nonprofits** that demonstrate successful models of engaging older adults.

- Provide more **funding for training and placement programs** that target older adults through One Stop Career Centers like WorkSystems.

- Invest in funding the infrastructure of an existing organization like Technical Assistance for Community Services (TACS) or a new organization that can serve as a **broker between older adults who want to work in the nonprofit sector and nonprofit organizations**. Think of a temporary agency model targeting nonprofits that can cover a full range of compensation including paid, partially paid and unpaid work.

- Invest in funding in nonprofit organizations for **succession planning and executive transitions**.

- Provide funding for **executive coaching and professional development.** Fund support for structured peer networking opportunities for executives.

- Annually **recognize the top ten best nonprofit organizations** that engage older adults with compensatory prizes.

- Provide **seed money for colleges and nonprofits** to develop educational programs designed to tap the time, talents and skills of older people.

- Provide **general operating and unrestricted support,** more multi-year support and capacity-building support for nonprofits.

Community at Large

- Create an **online resource and information packet** available for employers of all sizes with information and tips on how to make a workplace friendly for all ages. Potential sponsors: Portland Business Alliance, Oregon Business Council, Oregon Business Association.

- Organizations such as Life by Design Northwest, Hands On Greater Portland and Idealist.org develop and maintain comprehensive content on their **websites for older adults with links and resources** for discovering, designing and engaging in their later years.

- Make current local **employment placement and training programs** work more effectively for older people.

- **Transform neighborhood schools into community centers** for all ages and activities, considering using school buses as transportation options. See complete report on the web which details the case for schools.

- Provide and strengthen **opportunities for social interaction** among isolated and vulnerable, older adults. This alleviates or reduces isolation, loneliness and depression. Faith communities, community associations and individuals can be very important resources in this area.

Multnomah County

- Be a model **governmental employer** of older adults in recruitment, retention, management, training and the development of policies and procedures.

- Identify **one contact** as a resource for citizens who may want to directly volunteer for the County and for any County manager who may have a project or job for a volunteer.

- Develop and/or strengthen **existing intergenerational approaches** of human service programs that the County directly provides or funds throughout its departments.

- Expand programming and **outreach by Multnomah County library** to older adults. For example, use one of "Everyone Reads" campaigns on a book about different generations and their interdependence with each other.

- Offer **award points in County Requests for Proposals (RFPs)** in the external contracting process for organizations that create effective engagement opportunities for older adults.

- Create an ongoing **vital aging awareness campaign** that displays positive examples of older adults as employees, engaged and giving in our community. Possible sponsors: The Oregonian, Portland Business Journal, local hospitals, health insurers and television stations.

- **Share County practices** and learning with other private and public employers.

- Create a **community engagement plan** that utilizes members of the Task Force on Vital Aging and workgroups to reach out and share results of this final report with community groups and other organizations.

- Partner with the City of Portland's planning department in strengthening Portland and Multnomah County as a community for all ages by **building on the "Age-Friendly Cities" report** published by the World Health Organization.

- **Leverage resources** with other public and philanthropic funders in intergenerational programs, such as the SUN Schools Initiative and the Oregon Community Foundation and others.

- Maintain up-to-date vital aging **resources on the County's website**.

- Work with Greenlight Greater Portland, City of Portland, Oregon Business Council, Portland Business Alliance, State of Oregon and other appropriate groups in promoting the **recruitment and retention of older adults as an economic development strategy.**

- Pursue opportunities for **national philanthropic funding and investment** in Multnomah County as a model community for vital aging.

Public Policy Considerations

- Provide **tax credits for employers** who hire low-income older adults.

- Reduce minimum number of hours required in order to be **eligible for health insurance**.

- Advocate for **change in IRS laws** to allow individuals to work and drawn on earned pensions in the same company after age 55.

- **Change defined benefit retirement** plan pay-outs from 'last three years' to 'best three years.'

- Advocate making **health insurance portable** and not tied to any one employer.

- Create **greater flexibility** in wage and hour laws for nonprofits to utilize stipends and other forms of compensation.
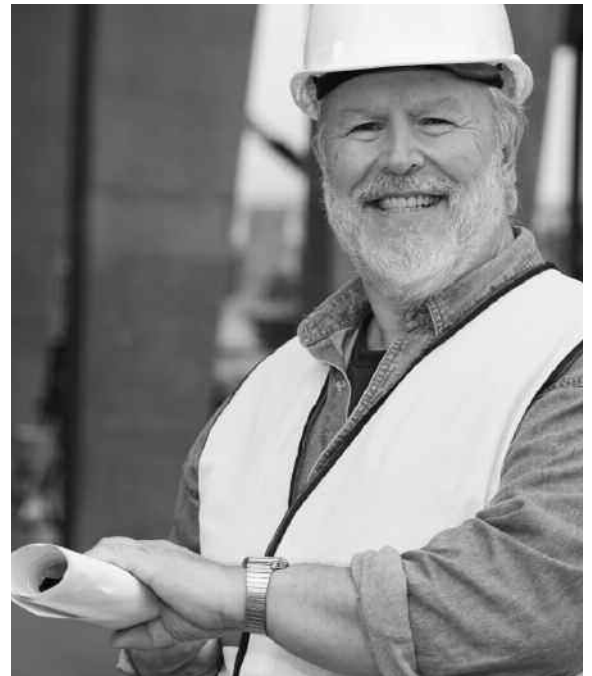
- Provide **tax credits to individuals volunteering** in nonprofit organizations or schools.

- **Open state employees' health insurance pool** for nonprofit organizations to use the umbrella of a larger group to purchase health insurance for their employees.

- Significantly **expand national community service programs** such as Experience Corps, AmeriCorps, RSVP, Foster Grandparents, Senior Companions and Peace Corps.
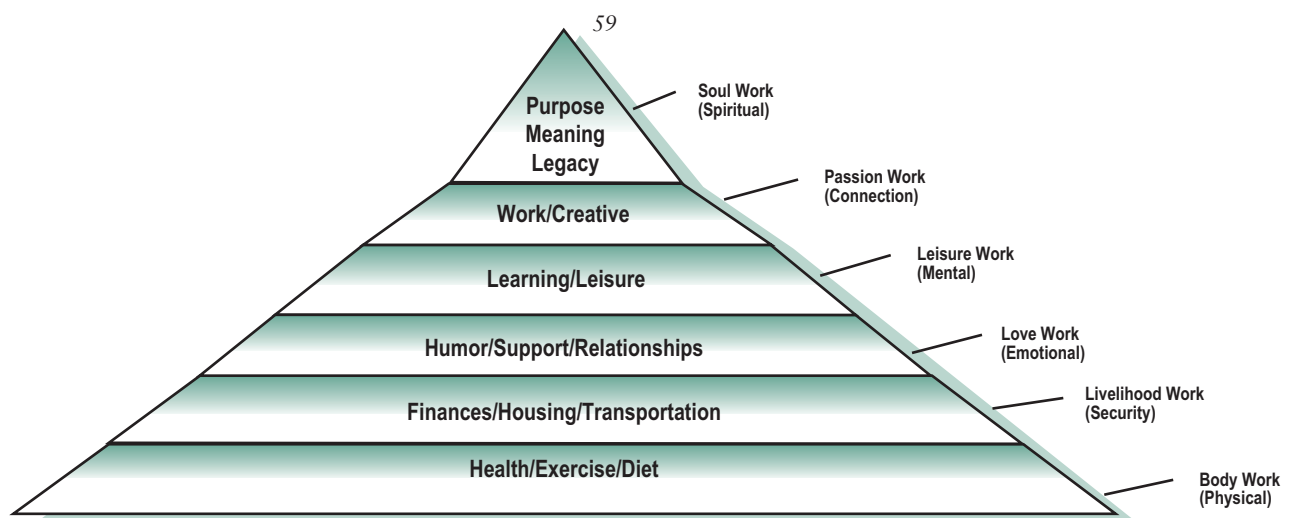
CONCLUSION

Getting older is a fascinating thing. The older you get, the older you want to get.[58]

<div align="right">

- KEITH RICHARDS
</div>

- **Older adults represent a growing resource** for employers and nonprofits

- **One size does not fit all**. Individual choice and flexibility will be the driving forces.

- **Changes are needed** in organizational technical practices and in the adaptive attitudes of managers and employees.

- **Best practices for employing and engaging older adults make organizations** more **attractive** to workers of all generations.

- **Older adults represent a significant economic development opportunity**. See the online complete report for more details.

- **An age friendly community for older adults** is an aging friendly community for all ages.

While the work of the Task Force is complete, the magnitude of these issues indicates the need for further discussion, planning and action. No organization will be untouched by the dramatic demographic change that is taking place.

Each of us hopes to have the option of facing the question, "What can I do to create a purposeful and vital life in my later years?" This pyramid illustrates the hierarchy of needs of older adults which range from satisfying basic needs to attaining purpose and meaning.

[59]

Purpose Meaning Legacy — Soul Work (Spiritual)

Work/Creative — Passion Work (Connection)

Learning/Leisure — Leisure Work (Mental)

Humor/Support/Relationships — Love Work (Emotional)

Finances/Housing/Transportation — Livelihood Work (Security)

Health/Exercise/Diet — Body Work (Physical)

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It is very hard to say no to work. We may courageously resign, take a sabbatical, or retire to a simpler, more rustic existence, but then we are engaged in inner work, or working on ourselves, or just chopping wood. Work means application, explication, and expectation. There is almost no life human beings can construct for themselves where they are not wrestling with something difficult, something that takes a modicum of work. The only possibility seems to be the ability of human beings to choose good work. At its simplest, good work is work that makes sense, and that grants sense and meaning to the one who is doing it and to those affected by it.[60]

-DAVID WHYTE
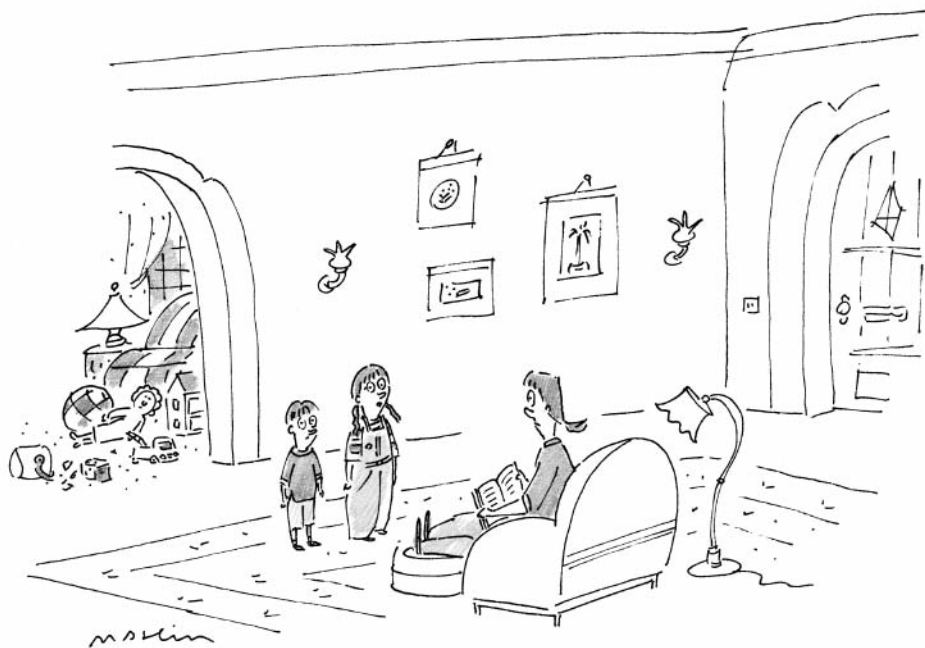
"*We're tired of playing. We want to work.*"

If our older generation wants to engage in our community, we cannot afford to pass on this gift. We challenge organizations and individuals to imagine the possibilities.

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