

## **Boomers Leading Change in The Chronicle of Philanthropy**

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# **Baby Boomers Seek a Purposeful Direction in Later Life, Study Finds**

[By Suzanne Perry](#)

What do baby boomers want? Many charities and foundations have been asking that question now that the oldest members of the generation that is expected to redefine retirement are entering their 60s.

Do they plan to work or volunteer for nonprofit groups, or to look for programs to stimulate them intellectually and culturally, once they hit traditional retirement age? The Rose Community Foundation, in Denver, decided to find out by asking boomers directly about their plans.

The foundation conducted online and written surveys, interviews, and focus groups with people 55 to 65 in the Denver metropolitan area. It has just tabulated the results, and a few things stand out.

First, many of those surveyed want to do something meaningful in the next stage of their lives, and would like to find a "connecting point," or clearinghouse, to help them plan it.

"A clear theme that keeps coming up is people want to have a purpose in their life, they want to be doing something different," says Therese Ellery, a senior program officer at the Rose foundation. "They just don't know how to go about doing that."

Second, many boomers think nonprofit groups need to improve the way they run their volunteer programs. "Survey respondents and focus-group participants reported that volunteer coordinators are sometimes unskilled in using volunteers, that volunteers' expertise is not used effectively, and that they were sometimes overworked or felt unappreciated," a foundation report on the survey says.

Those surveyed also said their choices about what to do next would be influenced by their access to health-care benefits. "There is interest in further exploring potential models for tying health-care benefits to volunteerism and part-time, flexible work, as well as harnessing the passion and experience of boomers into longer-term, more comprehensive health-care reform," the report says.

### **\$75,000 Effort**

The Rose foundation conducted its survey with the help of a \$25,000 grant from Atlantic Philanthropies, in New York, under a program that gives community foundations money to

expand opportunities for older people to work for social causes.

Rose also threw in \$50,000 of its own money, hoping to gather data to help it assess whether to re-evaluate its grant programs for services to help older people, given changing demographics — that is, the huge wave of 78 million boomers who are expected to live longer, healthier lives than previous generations, says Phil Nash, the foundation's vice president for communications. The foundation's programs now focus on helping the "frail elderly," older people with health, mobility, or other problems.

"Our aging program area has traditionally dealt with what are seen as some of the deficits in the older-adult arena," Mr. Nash says. "This isn't quite what it's going to be like with the baby boomers coming on."

Rose questioned people ages 55 to 65 about their plans for work, volunteering, and learning — posting surveys online and distributing them at places such as job fairs and churches. (Technically, the oldest boomers are 61, as the term covers people born in the years from 1946 to 1964. But foundation officials said they extended the age to 65 because it wanted to capture the years when people are most likely to be making decisions about their post-retirement lives.)

More than 1,000 people in the Denver metropolitan area completed the boomer survey — about 772 of which were usable for analysis. Rose also conducted 14 focus groups and surveyed more than 400 employers, nonprofit groups, and educational centers about how they are involving, or could involve, older people in their work.

Among the results, as compiled and analyzed by a Denver consulting firm, JVA Consulting:

- Asked about future plans, 70 percent of the boomers said they would like to take classes for fun, 51 percent to change to part-time or flexible work, 39 percent to take a leadership role in a nonprofit group, and 35 percent to return to school.
- Thirty-seven percent expect to be retired in 10 years, 25 percent working part time, and 20 percent still fully engaged in their careers.
- Fifty-three percent are currently doing volunteer work and 49 percent want to do so in the future. For those considering future volunteer work, neighborhood work was the most popular cause (36 percent), followed by children's issues (34 percent) and advocacy (33 percent).
- The nonprofit groups that were surveyed gave themselves higher marks on their volunteer programs than the boomers did. Eighty-three percent said they were motivated to engage boomer volunteers; 78 percent that they matched individuals' interests and skills; and 61 percent that they have the infrastructure to support such volunteers.

The foundation found some differences by income level. For example, 65 percent of the respondents were interested in lifelong-learning opportunities such as classes, lectures, or workshops, but respondents in lower income brackets were more interested in job-training

programs.

In the focus groups, all but a handful responded positively to the motto chosen by Atlantic Philanthropies for the Community Experience Partnership: "In the '60s, they changed the world. In their 60s, they just may do it again."

"Participants echoed, 'We *will* do it again!'" the report says.

Not everyone was keen on the word "boomer," however. To some Latinos, the term is associated with a "white, middle-class experience," the report says. The groups also grappled with what to call people in the later stage of life, rejecting terms such as "senior," but none found a term that won universal acclaim, it adds.

### **Getting Advice**

The Rose foundation is being guided in its work by a community advisory committee composed of about 60 people ages 55 to 65 — including academics, nonprofit heads, business people, and minority-group leaders. The foundation has asked committee members to suggest how they would award grants to help link older adults with meaningful work, classes, or other activities in the next phase of their lives, Mr. Nash says.

Atlantic Philanthropies started the first phase of the Community Experience Partnership in August, awarding about \$1.8-million in grants to 30 foundations to assess the resources that were available in their cities or regions to promote civic engagement of older adults. Mr. Nash says the foundation hopes to participate in the next phase of Atlantic's Community Experience Partnership, scheduled to begin next fall, which will ask community foundations to identify a pressing community need and develop ways to use older adults to help solve it.

Charitable organizations will soon have the benefit of data about boomers from the entire state of Colorado. Another Denver foundation, the Colorado Trust, is spending \$40,000 to survey boomers outside of the Denver metropolitan area, but results are not yet available.

Irene Ibarra, the trust's president, says the foundation wants to be ready for a generation that will age differently than its parents. "What we wanted to say is how do we not only anticipate the health needs, but how do we look at their interests for the future so we can harness their energy?" she says.