

# STUDY FINDINGS

## Corporate Baby Boomers and Volunteerism

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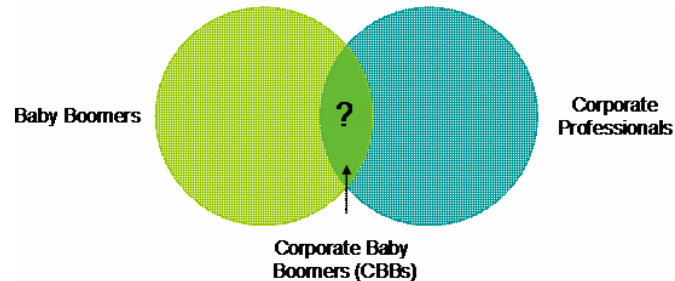


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## Executive Summary

Significant research has been done over the last five years on the volunteer needs for Baby Boomers and corporate employees. This study seeks, for the first time, to understand the intersection of these two demographics – corporate Baby Boomers (CBBs).



In one-on-one interviews and focus groups with CBBs in Silicon Valley in 2007, we explored the similarities and differences between the broader Baby Boomer and corporate communities. What emerged was a clear picture of the opportunity to engage CBBs in service.

- CBBs see service as a core part of their life going forward.
- CBBs are looking for clear, effective, and well-managed volunteer opportunities that will leverage their skills and experience and can be flexibly integrated into their schedules.
- CBBs have the largest concentration of transferable skills as management analysts, personnel managers, chief executives, administrative and public officials, and communications specialists.
- CBBs may be more difficult to reach than younger generations due to the diversity of channels they use to gather information.

CBBs with these professional skills represent a major opportunity to bring millions of dollars worth of assistance to the nonprofit sector. The necessary infrastructure, however, is not yet in place and must be created to deliver professional-grade engagements that meet the unprecedented high standards of CBBs.

## About This Study

The David and Lucile Packard Foundation funded the Taproot Foundation to research how to effectively engage Silicon Valley's CBBs in volunteer service. Through a literature review, interviews with individuals and groups with specific expertise in Baby Boomer engagement, and a series of interviews and focus groups with CBBs, this research sought to learn more about the motivation, interests and needs of Boomers, and to ascertain the program requirements and skill usage necessary to create programs that effectively engage them in volunteer service.

## Research Methodology

### 1. Literature Review

To begin this research, a literature review and series of interviews with topic experts were conducted to better understand the existing foundation of research on this topic. Numerous existing studies have discussed the Baby Boomers' shift of the traditional retirement paradigm. Included in this is the ubiquitous statistic that nearly 80% of Boomers plan to stay employed in some way past the traditional retirement age, opting to work part-time, change careers, or volunteer their services rather than ceasing to work<sup>1</sup>. Among Boomers, this widely expressed

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<sup>1</sup> *Baby Boomers Envision Their Retirement: An AARP Segmentation Analysis*. Roper Starch Worldwide Inc. and AARP, 1999.

expectation of staying 'active' and 'productive' after a full-time, long-term career's end is commonly described as a desire to "cycle between periods of work and leisure" and maintain a variety of activities and commitments<sup>2</sup>.

As Boomers evaluate new volunteer activities in particular, many report an emphasis on the ability to exercise a degree of ownership for their work and the attached outcomes, desiring opportunities that leverage their personal skills, rather than engage them as generic volunteers<sup>3</sup>.

According to Greg Baldwin, President of VolunteerMatch, Boomers are looking for a project that is based on both a nonprofit's needs and their own specific ability to address them, a pairing that cannot easily happen with generic volunteer matching to standardized roles and tasks. Several studies, including the recently-released VolunteerMatch 'Great Expectations' survey, include rankings of Boomers' volunteering preferences, reporting that among Boomers' top priorities are the opportunity to leverage their skills on a cause they care about, that is challenging, convenient and fits their schedule<sup>4 5</sup>. Especially among those Boomers who have volunteered throughout their careers, Baldwin cites, the bar is set particularly high for the structure of the volunteer opportunities they will choose later in their careers. As noted by Tom Endres, Vice President of Civic Engagement for the National Council on Aging, meeting this high bar requires compelling and well-structured volunteer opportunities, engagements where the quality of the process itself will be a key determinant of the opportunity's effectiveness.

## 2. Interviews

As part of the primary research gathering portion of this study, individual interviews were conducted with thirteen CBBs. All of these participants had reached a senior manager position or beyond and were primarily based in Silicon Valley. Interviewees were pulled from the Taproot Foundation's existing network of volunteers, individuals connected with the Packard Foundation and other Silicon Valley institutions and employees/retirees of Silicon Valley companies. Participants were asked a series of questions focusing on their professional and community service backgrounds, motivations for volunteering, likes/dislikes about existing volunteer opportunities, preferences for ideal volunteer opportunities, the channels through which they currently become involved in the community, and retirement plans.

## 3. Focus Groups

A pair of focus groups were also conducted, involving a total of eighteen senior manager-level Baby Boomer employees from Adobe and Intel. Like the interview questions, focus group questions were left intentionally objective, without prompted mention of skills-based volunteerism or pro bono work. Rather, the conversation prompts focused on general positive and negative volunteer experiences, defining ideal volunteer opportunity requirements, and retirement plans.

The demographics of the focus groups were:

- 59% ages 43-50, 41% ages 51+
- 53% female, 47% male
- 76% 'working full-time', 24% 'semi-retired', 0% 'retired'
- 100% senior manager or higher role in major Silicon Valley company
- 100% volunteered on more than one occasion in the last 1-2 years, 49% used their professional skills to help a nonprofit

*Specific focus group questions are listed in the Appendix.*

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<sup>2</sup> *The New Retirement Survey*. Harris Interactive and Age Wave for Merrill Lynch, 2005.

<sup>3</sup> *Ways to Engage at Any Age: Findings from a Scan of Older Adult & Youth Civic Engagement Programs*. PACE—Philanthropy for Active Civic Engagement, 2006.

<sup>4</sup> *Great Expectations: Boomers and the Future of Volunteering*. VolunteerMatch, 2007.

<sup>5</sup> *Keeping Baby Boomers Volunteering: A Research Brief on Volunteer Retention and Turnover*. Corporation for National and Community Service, 2007.

## Findings

### *1. CBBs Expect to Volunteer*

In sharing their current or assumed 'retirement' plans, all respondents described a mixture of part-time or episodic employment, traveling, and community service, including volunteering and teaching. The majority of focus group and interview participants expressed a desire to balance intellectual and skills-based activities with more hands-on direct service, with a strong assumption that the latter opportunities would continue to be present through children, church, and neighborhood ties. Many participants in both focus groups also expressed strong desires to participate in volunteer activities in which they could also involve their children. Frequent comments expressed the desire to "expose [my son] to volunteering now so he'll keep doing it later" and wanting to make sure that "[my] kids see me volunteering... sending the message that helping out is important".

### *2. CBBs Have High Expectations and Demands*

There was a strong sentiment among participants that only the "right" activity would merit the use of their time. This ideal activity was consistently defined by respondents as one that would take advantage of their skills and experience; add significant, recognizable value to the nonprofit and/or community; accommodate flexible schedules; and entail working with the right people, who were frequently defined as "inspiring", "innovative", "intelligent" and "accomplished". When asked to elaborate on the skill sets that they would like to use in these activities, participants in both focus groups concurred that using the professional skills that they "enjoy" would get the most out of them as volunteers. As one focus group participant stated, "I wouldn't want to spend my own time doing everything that I do at work, but there are parts of my job and my skills that I enjoy using, and I'd doubly enjoy them if I knew that I was making a difference with them". In addition, respondents expressed that they are interested to learn new skills that would compliment or build upon their existing strengths, especially if it would help them add value.

This need to exercise choice was also reflected in focus group and particularly interview participants' descriptions of their decision-making processes when considering involvement in a new volunteer or professional activity. Respondents replied nearly uniformly that they were inclined to critically evaluate all uses of their time for both professional and extracurricular activities, particularly once they stopped working full-time.

### *3. CBBs Want Structured Opportunities Using Skills*

Focus group and interview responses were strongly consistent around the desire for clearly defined volunteer opportunities. Specifically, respondents wanted clear expectations for both the nonprofit and the volunteer regarding defined roles and tasks, clear outcome goals, clear timelines and time commitment, and a clear understanding of the expected value and implementation of the activity. Common comments included sentiments like: "without thoughtful structure there is always frustration; it's frustrating for me as a volunteer to know I'm not being as useful as I know I can be, and frustrating for the nonprofit who is wasting time spinning wheels around managing us"; "Not being able to make good use of the volunteers there is a waste that I can't tolerate"; "If there are too many different goals and too open a timeline I wouldn't go back, I wouldn't count on it being successful".

When asked to elaborate on preferred time commitments, respondents expressed a strong preference for finite (verses ongoing) engagements to allow flexibility for other activities. This preference was not directed towards the length of the engagement, but rather a clearly scoped beginning and end. As one focus group participant articulated: "Even when I'm not working full-time my time is valuable to me and I need to be able to plan around my commitments. Tell me how long you'll need me, what you want me to get done, and then I can do it, do it well, and then move on to something else".

Participation in the scoping of volunteer projects was also an area of strong inclination. The majority of focus group participants expressed a desire to have the latitude to exercise discretion, opinion and personal experience in fulfilling volunteer projects, rather than engage in what was seen as “restricted”, “predetermined” and “limited” volunteer roles. Respondents reported wanting to feel that their individual participation was beneficial to the nonprofit, leveraging their skills and experience to add value to the organization. “I like a little structure,” one corporate manager said, “but [the nonprofit] insisted the task had to be done all one exact way and I thought ‘I’ve done this for a living, I can help you do this better so why wouldn’t you want to let me help you?’”. Others concurred: “[The nonprofits] seemed intent on doing things a certain way, not necessarily the best way, and were totally resistant to trying to change that, even for the better, and I’m thinking ‘use me!’”; “I want to feel like the specific skills and experience I’m bringing to the table are helping, I don’t want to just be another warm body”.

#### *4. Large Number of CBBs with Needed Skills*

In the US there are currently 78 million Baby Boomers, 32 million of whom are ages 50+. In Silicon Valley, where the fluctuating population is currently pegged at around 1.7 million, nearly 35% or 595,000 people are estimated to be Baby Boomers.

Bureau of Labor and Statistics data indicates that these Boomers heavily populate several roles and skill sets known to be transferable to the nonprofit sector. Specifically, 41% or more of each of the following roles is estimated to be filled by Baby Boomers: management analysts, personnel managers, chief executives, administrative and public officials, and communications specialists<sup>6</sup>. The high concentration of Boomers in these roles alone suggests a great opportunity to leverage transferable skills to help the nonprofit sector.

#### *5. Reaching CBBs is Challenging*

A new paradigm must be created to reach out to CBBs and then engage them as volunteers. Focus group and interview discussion revealed conflicting feedback about existing outreach channels. While the majority of focus group participants reported learning about their current volunteer opportunities through their employers, there was also significant concern expressed that volunteer opportunities provided by companies often felt compulsory. In addition, while most focus group participants cited friends and the internet as their other common sources for volunteer opportunities, they look elsewhere for specific skills-based volunteering opportunities: networking groups, job search websites and listserves, articles, and professional colleagues. Pursuing a combination of all of these channels might be necessary, but it will also be time-consuming and expensive. To be most effective, a new paradigm must be created to reach out to CBBs and then engage them as volunteers, one that will bear a stronger connection to that style of engagement that CBBs prefer along with their motivations for involvement.

### **Outstanding Questions**

This study raised several questions in the further understanding of engaging CBBs as volunteers:

1. Will these findings be consistent outside of the Silicon Valley corporate community? Regional and sector differences might vary the applicability of these findings; would CBBs in different regions respond differently? How, if at all, do these findings apply to Boomers in the public sector, where there exist different norms, volunteer engagement programs and a lower retirement age?
2. What differences will be present among Boomers who have already been retired for several years? How, if at all, does the ratio of part-time work to volunteering time change when one has been out of a long-term career role for a longer period of time?
3. What is the appropriate role for companies to play to encourage/foster volunteerism among their Baby Boomer employees and retirees? Should employers bear some responsibility for engaging employees in service activities before retirement so as to instill a commitment to community service?

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<sup>6</sup> *Current Population Survey (CPS)*. Bureau of Labor and Statistics, 1999.

### **Recommended Actions**

To realize the potential of this large pool of talent, infrastructure must be developed to fulfill the needs of this demanding population. Given the bar that must be achieved, programs must be designed and refined to adequately meet the robust management needs of these engagements and deliver maximum value to the nonprofits and the CBB volunteers. Once these have been developed, resources will need to be spent on outreach to CBBs.

1. Infrastructure must be developed to engage CBB skills at an unprecedented level of quality that meets their criteria:
  - Clear, effective, and well-managed
  - Leverage their skills and experience
  - Can be flexibly integrated into their schedules
2. Volunteer engagements should focus on leveraging the most common CBB skills, as in the skills they developed in their roles as management analysts, personnel managers, chief executives, administrative and public officials, and communications specialists.
3. Once these programs have proven they can deliver to CBBs and nonprofits, investment should be made in outreach programs through a variety of channels.
4. In addition, CBBs will continue to want traditional direct service opportunities. Organizations that provide these services should continue to market to CBBs and look at how they can increase the quality of the experience to boost satisfaction and engagement.

## APPENDIX

### Bibliography

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1. *Baby Boomers Envision Their Retirement: An AARP Segmentation Analysis*. Roper Starch Worldwide Inc. and AARP, 1999.
2. *The New Retirement Survey*. Harris Interactive and Age Wave for Merrill Lynch, 2005.
3. *Ways to Engage at Any Age: Findings from a Scan of Older Adult & Youth Civic Engagement Programs*. PACE—Philanthropy for Active Civic Engagement, 2006.
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6. *Current Population Survey (CPS)*. Bureau of Labor and Statistics, 1999.
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8. *Expanding the Boundaries of Corporate Volunteerism: Retirees as a Valuable Resource*. The Center for Corporate Citizenship at Boston College, 2005.
9. *Volunteer IMPACT Study*. Deloitte/Points of Light, 2006.
10. *Volunteer Management Capacity in America's Charities and Congregations: A Briefing Report*. The Urban Institute and the UPS Foundation, 2004.

### Expert Interview Subjects

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#### Topic Experts

- Atlantic Philanthropies: Brian Hofland, Director of the Aging Program
- BTW informing change: Tina Cheplick, Senior Associate
- Center for Productive Longevity: William Zeinke, Founder
- Civic Ventures: Marc Freedman, Founder and President
- National Council on Aging: Tom Endres, Vice President of Civic Engagement
- VolunteerMatch: Greg Baldwin, President

#### Companies

- Adobe Systems, Inc: Margaret Tamisiea, Community Relations Program Manager
- Cisco Systems, Inc: Maggie Larson, Senior Manager of Civic Programs
- IBM: Diane Melley, Director of Corporate Community Relations
- Intel Corporation: Rita Holiday Community Relations and Grants Manager

### Focus Group Questions

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1. **Introduction (10 minutes)**
  - Welcome and introductions

- Purpose of discussion and reason for selection of participants
    - *Taproot Foundation has partnered with the Packard Foundation to understand how corporate Baby Boomers in Silicon Valley can best be engaged in volunteerism. As part of this research we'd like to learn more about the needs and interests of "Boomer" employees and retirees in Silicon Valley.*
  - Ground rules and discussion guidelines
    - *We would like the discussion to be informal, so there's no need to wait for us to call on you to respond. In fact, you are encouraged to respond directly to the comments other people make. If you don't understand a question, please let me know. I am here to ask questions, listen, and make sure everyone has a chance to share.*
    - *We want your opinion as individuals, as corporate Baby Boomers, not hypothetical*
    - *If we seem to be stuck on a topic, I may interrupt you and if you are not saying much, I may call on you directly. If I do this, please don't feel bad about it; it's just our way of making sure we obtain everyone's perspective and opinion is included.*
    - *I am independent of your company*
    - *Excuse yourself quietly at any time to use the restrooms*
  - Confidentiality
    - *Information discussed will be analyzed as a whole and participants' names will not be used in analysis of the discussion*
    - *We do ask that we all keep each other's identities, participation and remarks private*  
*We hope you'll feel free to speak openly and honestly*
- 2. Suggested Topic Discussion and Prompts (40-80 minutes)**
- Ice breaker introduction – find out more about each other by going around the room one at a time
    - *First name, job you have or most recently had (any retirees?) and briefly – what/when was your first memory of a volunteer or community service activity?*
  - Task at hand
    - *Convened this group to generate a comprehensive list of the needs, concerns and interests of Baby Boomers regarding volunteering/community service opportunities.*
  - Bad volunteer experiences – *think about common themes of frustration. Easiest to get conversation started with examples from the past.*
    - *Dive further into these examples?*
  - Good volunteer experiences – *common themes from opportunities you have enjoyed/valued most*
    - *Dive further into these examples?*
  - Ideal opportunity – *if you are currently seeking something or waiting only for right opportunity, what are some logistics/descriptors for what that opportunity would have/look like?*
    - *In person vs. virtual, team vs. solitary type of skills used), long term commitment vs. one-time commitment. Has this changed at all from earlier in your career?*
  - Channels- *where are you looking for volunteer opportunities? How are you keeping up with your profession?*
  - Retirement – *What do you picture your retirement looking like? How will time be spent?*
    - *Working? Part-time? Volunteering? Traveling?*
- 3. Closing**
- Thanks, follow up (contact information)

### **About the Taproot Foundation**

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The Taproot Foundation strengthens nonprofits by engaging business professionals in service. As the largest provider of pro bono consulting services to the nonprofit sector, the Taproot Foundation delivers critical infrastructure-building support to local nonprofits by extending the pro bono service ethic across the business professions.

Aaron Hurst founded the Taproot Foundation in 2001, 40 years after his grandfather, Joseph E. Slater, wrote the original blueprint for the Peace Corps. Inspired by his grandfather and the Peace Corps' ethic that seemingly intransigent boundaries can be crossed when people work together as peers, Aaron created the Taproot Foundation to connect this country's millions of business professionals with nonprofits who need their talents and experience. Since 2002, the Taproot Foundation has recruited over 10,000 business professionals to provide \$25 million worth of professional services to more than 500 nonprofit organizations. The Taproot Foundation currently has offices in San Francisco, New York, Chicago, Boston, and Seattle and will be expanding to Los Angeles and Washington, D.C. in 2008-2009.

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### **About the David and Lucile Packard Foundation**

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The David and Lucile Packard Foundation was created in 1964 by David Packard, the co-founder of the Hewlett-Packard Company, and Lucile Salter Packard. Throughout their lives in business and philanthropy, the Packards sought to use private funds for the public good, giving back to a society which enabled them to prosper.

Guided by the business philosophy and values of our Founders, the David and Lucile Packard Foundation invests in and takes smart risks with innovative people and organizations to improve the lives of children, enable the creative pursuit of science, advance reproductive health, and conserve and restore earth's natural systems.

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