

NEXT CHAPTER

Initiative

Wyandotte County Boomer Survey

Wyandotte County Boomer Survey Final Report

**Prepared for the
Wyandotte County Next Chapter™ Initiative**

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About the Wyandotte County Next Chapter™ Initiative Executive Council

This project has been guided by the outstanding contributions of the Executive Council, whose membership is comprised of leaders from the eight organizations that formed this initiative. They are as follows:

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Don Wise, Executive Director, Civic Leadership Training Council

Additional community leaders who were consulted for the project included Mary Lou Jaramillo and staff at El Centro, Inc.; Mary Jane Johnson and staff at Liveable Neighborhoods, Inc.; and Diane Hentges at United Way of Wyandotte County.

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About Ristau & Associates, LLC

Stephen Ristau has 35 years in the human service sector as an executive, senior manager, consultant and trainer, and clinician. He has worked in nonprofit, governmental and corporate environments.

Presently located in the Northwest, he works through his consulting firm, Ristau & Associates, providing project consultation and training services to nonprofit organizations across the United States. His recent work, *PurposeWork*, has focused on expanding the connections between older Americans, especially the baby boomer generation, and nonprofits. He sees great opportunities for nonprofits to engage the talents and passion of experienced professionals to serve and work in their communities, and find greater meaning and purpose in their lives.

He is a contributing author of the *Idealist Guide to Careers in the Nonprofit Sector for Sector Switchers* (2008), and to *Boomers and Beyond: Reconsidering the Role of Libraries* (American Library Association, to be published in 2010).

He received his M.A. in Human Development and Family Relations from the University of Connecticut, is a trained marriage and family therapist and parent educator, and a practicing spiritual director.

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Introduction and Description of the Wyandotte County Next Chapter Initiative

National surveys suggest that the “baby-boomer” generation is approaching the traditional retirement years differently than previous generations. Baby boomers, born between 1946 and 1964, number 78 million nationwide, and in 2006, the oldest boomers began turning 60.

As they transition to the next chapter of their lives, many boomers are realizing that due to a number of factors such as health and longevity, financial stability, personal and family relationships, and pressing community needs, the so-called retirement years may offer new options for work, service, and lifelong learning.

The Wyandotte County Next Chapter Initiative, a coalition of eight local organizations, formed in 2008 with the support of the Jewish Heritage Foundation and the George H. Nettleton Home, Inc to examine the opportunities and challenges boomers face and develop strategies to serve and engage people currently ages 45-70¹ in Wyandotte County, Kansas.

The coalition includes the Shepherd’s Center of Kansas City, Kansas, which serves as lead agency; the Civic Leadership Training Council (Leadership 2000); the Kansas City Kansas Area Chamber of Commerce; the Kansas City Kansas Community College; the Kansas City, Kansas Public Library; the Landon Center on Aging; the Wyandotte/Leavenworth Area Agency on Aging; and the Unified Government of Wyandotte County/Kansas City, Kansas. Supporting organizations to the coalition include United Way of Wyandotte County, El Centro, Inc and Liveable Neighborhoods, Inc.

Wyandotte County is located in the Kansas City Metropolitan Area, a bi-state and nine-county region. The county population is about 154,000. The largest city is Kansas City, Kansas, which is primarily urban, but has seen significant suburban growth over the past 10 years. The county also has three cities of 8,000 or less: Bonner Springs, Edwardsville, and Lake Quivira.

In Wyandotte County, there are over 37,000 baby boomers currently ages 45-63 or 24% of the total county population. When persons ages 64-70 are added, the target population is 27% of the total county population.² A cohort of this size and potential impact requires focused examination and planning.

The planning phase of the Initiative sought to:

- Identify the attitudes, perceptions, needs and preferences of those ages 45 to 70 in Wyandotte County,

¹ The baby boomers are generally regarded as being born between 1946 and 1964, making them 45 to 63 in 2009. For the purposes of this project, the upper age limit has been extended to age 70 and have been included in the “boomer” cohort.

² Source: Unified Government of Wyandotte County, Kansas City, KS- Report 2 *Population By Age and Sex*, 2007 Census.

- Understand their interests and desires concerning their future participation in the workforce, in community service, and in training, education and learning,
- Review Next Chapter programs nationally as well as of other civic engagement models, and
- Based upon these findings, make recommendations regarding local strategies and actions that will effectively serve and engage the target population.

Methodology

A 40-question survey (see Wyandotte County Boomer Survey results in appendix) was designed based upon other similar boomer surveys administered in Denver, CO and Hartford, CT.³

The survey was administered in online format promoted through various coalition partners and community electronic communications, and in paper format distributed via the local libraries and other agency locations. Persons who lived, worked, or volunteered in Wyandotte County were invited to complete the survey. Data was collected from December 2008 through March 2009 from 623 respondents, a response rate that represents nearly 1.5% of the target population in Wyandotte County.

This was a formative research study designed to identify attitudes, perceptions, needs, and preferences of people aged 45-70. While those surveyed are not fully representative of the Wyandotte County population of these ages, it was possible to analyze data across various demographic cohorts. In addition, key informant interviews and focus groups will continue to inform the findings in the future and will provide data from populations that were underrepresented in the survey results.

Acknowledgements

There were several groups that distributed the questionnaire in addition to the coalition partners. They are the Kansas City Kansas Downtown Kiwanis Club; Kansas City, Kansas Public Schools; and the Volunteer Department of the Unified Government. All the Wyandotte County public libraries participated in the distribution of the paper format, with coordination provided by the Kansas City, Kansas Public Library. Newspapers covering Wyandotte County also publicized the survey and how to access it. This included The Bonner Springs Chieftain, Kansas City Call, Kansas City Kansan, Kansas City Star, The Record, and Wyandotte West. Sincere appreciation is offered to Coalition Partners and their public relations and information technology staffs, to supporting organizations, and to all other organizations and individuals who helped with the survey. Finally, special appreciation is extended to the Jewish Heritage Foundation and George H. Nettleton Home, Inc. for the funding which made this project possible.

³ See *Boomers Leading Change* at www.coloradoboomers.com and *The Career Transition Study* at <http://tla50.hyperarts.biz/files/LGHCareerTransitionStudyReport.pdf>

Summary of Top Findings

The following are the major findings based on the responses of those who participated in the Wyandotte County Boomer Survey:

- **The vast majority (73%) of boomers is currently employed full-time; less than 40% expect to be retired and not working in 10 years.** The remaining boomers (60%) expect to work in some capacity, if only part-time. The option to work part-time in the next phase of their lives was identified as important by 90% of boomers.
- **Once basic security needs are addressed, boomers seek social connections, meaningful and flexible work, the opportunity to make a difference, and learning and development opportunities.** As they contemplate the next phase of their life, nearly 9 out of 10 boomers rate basic needs such as health care benefits (91%), retirement benefits (89%), and the ability to collect a pension/social security (87%) highest in importance. These are followed in importance by being able to stay involved with people (87%), the ability to do meaningful, interesting, or challenging work (83%), the opportunity to help improve the quality of life in the community (78%), a flexible work schedule (77%), and opportunities for growth and development (74%).
- **Volunteerism is currently a part of most boomers lives.** A majority of boomers currently volunteer (56%) with 41% of them providing up to 5 hours per month. Of those persons 60-64, 25% report contributing 26 or more hours per month. Of those who do not currently volunteer, time limits (62%) and family obligations (51%) are the major barriers.
- **Boomers intend to serve and support their community.** Overwhelmingly, boomers plan to volunteer (85%) in the next phase of their life; six in 10 plan to make financial contributions to causes they care about and nearly four in 10 boomers surveyed report interests in working in nonprofits (39%) and engaging in advocacy activities (39%).
- **Boomers are motivated by the opportunities to make a difference and build social connections...but on their own terms.** For boomers interested in volunteering, the most important motivators/benefits are to:
 - Help the community (99%),
 - Volunteer for a cause one cares about (98%),
 - Make a valuable impact on the organization (97%),
 - Feel productive (96%),
 - Do a variety of activities (93%), and
 - Meet new people (91%).

They highly value flexibility (88%) and want to use their leadership, professional, and technical skills (84%). Although not the majority, a

significant number indicated they are interested in meaningful volunteer work that may lead to paid employment (48%) and in obtaining health benefits through their volunteer work (42%).

- **Flexibility and choice are key for boomers.** While some boomers do not expect to retire for financial reasons or have not yet decided what they will do when they retire, most people describe their desire for flexibility and choice/options to pursue their passions, and new kinds of work, service and learning; they also want to have the time to attend to family, personal, and community interests.
- **Continuous learning and development are valued by boomers.** The top reasons that boomers will participate in lifelong learning are for the love of learning (69%) and the opportunity to socialize and network (57%). Boomers are interested in shorter commitments or single events such as travel experiences (64%), workshops/seminars (60%) and non-credit community education (53%) although there is some evidence that interest in certain types of learning (travel, seminars, symposia) increases with income and education.
- **Skills training for new jobs in the next phase may have more importance for boomers with lower incomes.** While 40% of the respondents did not know if they would need job training or learn new skills for work in the next phase, of those boomers who reported they would need such training, persons with current annual incomes under \$55,000 responded affirmatively up to three times more than those with higher incomes.
- **Boomers have wide interests in social issues and present a large, experienced talent pool for nonprofits to tap into.** As potential employees in the next phase of their lives, boomers highest interests relate to education, children and youth. As volunteers, they are most interested in neighborhood work, helping older adults, faith-based activities, disaster relief and youth. As learners, their top interests are arts and culture, the environment, and health care. But there is a diversity of issues that capture boomers' interest. For example, they were asked to rank 20 possible future areas for volunteerism, and each area garnered at least 19% interest.
- **Where will they go for help navigating this life transition?** Just under half of boomers do NOT know where to go to find what's next for them (job, volunteer, learning opportunities) and among those who do know, most identified generic places such as local colleges and universities (27%), the internet (25%), churches (15%), public libraries (12%) and public schools and government resources (11%). No one was able to identify a specific resource **designed** to assist them with their transition.

National Promising Projects and Practices

Over the past decade, a plethora of strategies and programs have sprung up in response to the aging of the baby boomer cohort in the U.S. Led by the work of Marc Freedman⁴ and the organization he founded, Civic Ventures, fresh perspectives on aging have emerged that promote how older Americans can remain engaged, vital participants capable of valuable contributions to society.

In the short time since the turn of the century, nearly one hundred Next Chapter and positive aging initiatives such as the one underway in Wyandotte County, Kansas have begun as grass-roots community efforts. Big and small, most share the core components outlined in *Blueprint for the Next Chapter*.⁵ These are:

- Life planning programs
- Meaningful engagement through work and service
- Continued learning for new directions
- Peer and community connections
- Information and resource support (to support all of the above)

Additionally, complementary programs in caregiving, employment and re-careering, financial planning, leadership development, spirituality, and wellness are options that several Next Chapter programs have custom-designed for their communities.

Descriptions of a sample of Next Chapter projects nationally are provided in the **Appendix**. All contain program components, community partnerships, and development processes worthy of replication by the Wyandotte County, Kansas Next Chapter Initiative.

⁴ See Marc Freedman's books *Prime Time: How Baby Boomers will Revolutionize Retirement and Transform America* (1999) and *Encore: Finding Work That Matters in the Second Half of Life* (2007), and Civic Ventures at www.civicventures.org.

⁵ Civic Ventures publication (2005)
www.civicventures.org/publications/booklets/blueprint.pdf

Recommended Strategies for Program Development

Results from the Wyandotte County Boomer Survey are consistent with similar assessments conducted in other communities nationally and are also aligned with prevailing theories on adult development. Regardless of the recent economic volatility, the boomer generation as a whole is expected to be actively engaged in work, whether paid or unpaid, learning, and in making social connections and community contributions throughout their lives. For most boomers, this means at least an additional 25 to 35 years of healthy and productive living.

ISSUE:

Many boomers are so busy with their current work, personal, and community responsibilities that they have limited awareness of what's coming next, not to mention have done little planning for it. How can boomers become better prepared for what's next?

STRATEGY:

Design and deliver a series of educational forums, community book-reads, and speaker series to build awareness and early stage preparation for the pending transition. Engage leading-edge boomers and other older adults to assist in the program design and delivery.

ISSUE:

As a generation, boomers will revolutionize retirement as we have known it and will seek to remain engaged through work, volunteering, social connections and learning. How will they receive help navigating this new life transition?

STRATEGY:

Develop a life planning course that includes core curriculum tested in other Next Chapter initiatives, facilitated discussion forums and replication of Transition Navigators (*Discovering What's Next*, Newton, MA) or similar peer mentor model of support.

ISSUE:

Boomers report an interest in a range of social issues and community causes. How do they receive an overview of the social sector and the kinds of skills they will need to be effective?

STRATEGY:

Design and develop a program that orients interested boomers to the social issues landscape in Wyandotte County and assists them to become community leaders and advocates. Develop issue area tracks that provide boomers preparation for participation in specific interests (i.e., caregiving, education, health care, etc.)

ISSUE:

Boomers overwhelmingly report they plan to volunteer in causes they care about. Are faith-based organizations and community nonprofits prepared to engage people with the talent, leadership experience and passion that boomers bring?

STRATEGIES:

1. In partnership with United Way, foundations, community leadership programs and other major nonprofit organizations, create a nonprofit training program or participate in *Coming of Age's* (Philadelphia, PA) Learning Lab to build awareness, engage participation and build capacity among nonprofits about the human and financial resource potential that boomers bring. Provide ongoing coaching and consultation to nonprofits that experiment with new approaches.
2. Build or enhance an existing volunteer recruitment, web-based portal to recruit high-skilled volunteers.

ISSUE:

Either by necessity or by choice, boomers report they plan to continue working for pay well into their "retirement" years. They will seek flexible work options, and guidance about re-careering opportunities, small business start-ups, self-employment, and training to build needed skills. Is there a one-stop center that can provide these services to this unique but growing population?

STRATEGIES:

1. In partnership with the Chamber of Commerce, the community college, the workforce development board and area employers, assure that a range of employment-related services are available and customized to the needs of boomers in transition.
2. Work with employers to develop, where possible, flexible employment options, including part-time employment, independent contracting, durational project employment, job-sharing, bridge jobs etc. Consider establishing a Boomer-Friendly Workplace (Scottsdale, AZ) campaign to recognize progressive employment practices.
3. Work with nonprofit organizations to create flexible work and benefit options and internship/training programs for boomers seeking to shift careers, transfer their skills, or move from another sector into nonprofits.

ISSUE:

Whether for pleasure or for career, boomers intend to pursue learning over their lifetime. Do existing continuing education organizations have programs that will appeal to active boomer learners and engage them as teachers for their own subject-matter expertise?

STRATEGY:

Coordinate through local continuing education outlets (augment where necessary) a range of credit and non-credit wellness, enrichment and skill-based learning experiences. Incorporate boomers' interests in travel, interdisciplinary studies (i.e., humanities), and sharing their own knowledge as teachers, leaders, and facilitators.

ISSUE:

There is no specific place/resource that boomers identify as useful to them when they are ready to engage in the next chapter of their lives. How do all these program components get coordinated and publicized?

STRATEGY:

Most Next Chapter initiatives nationally serve as the hub agency or central clearinghouse of information and resources related to helping boomers prepare and engage in their next chapter. Most are comprised of several local partners who share the commitment to serving and engaging boomers in their area, and to securing the funding needed to perform the "hub" role. Next Chapter of Wyandotte County should continue to serve this role for the community.

Appendix

Wyandotte County Boomer Survey Results

Wyandotte County Boomer Survey (December 2008- March 2009)
623 surveys/ 562 completed

1. Which of the following best describes your current employment status:

Answer Options	Response Frequency	Response Count
Employed full time	73.3%	453
Employed part time	7.3%	45
Not in the labor force	1.5%	9
Retired (not working)	8.4%	52
Retired and interested in working again	1.6%	10
Self-employed	4.7%	29
Unemployed and seeking work	3.2%	20
answered question		618
skipped question		5

2. Which will most likely describe your employment status 10 years from now? (Check only one)

Answer Options	Response Frequency	Response Count
Between jobs	0.8%	5
Fully engaged in job/career	34.8%	215
Retired	39.2%	242
Self-employed	6.2%	38
Working part time	16.5%	102
Not in the labor force	2.4%	15
answered question		617
skipped question		6

3. As you contemplate the next phase of your life, rate each of the following statements based on whether it is something you would like to do or would not like to do.

Answer Options	Would like to do	Would not like to do	Response Count
*Change to part-time or flexible employment	409	174	583
*Free-Lance work/independent contractor	275	304	579
*Get involved in politics (e.g., work on a campaign, run for office)	169	410	579
*Have a leadership role in a nonprofit organization (e.g., serve on boards, etc.)	294	284	578
*Make a major career change	131	438	569
*Retire and not work for pay	271	303	574
*Return to school	201	366	567
*Seek job training	109	454	563
*Spend time with family & friends	572	16	588
*Start your own business	173	395	568
*Take classes for fun	462	127	589
*Teach	254	315	569
*Travel combining work, service and/or learning	376	202	578
*Travel for fun	549	44	593
*Volunteer	475	98	573
answered question			610

4. As you contemplate the next phase of your life, how important would each of the following factors be in your decision on what to do next (in employment, service, or learning)?					
Answer Options	Not at all important	Somewhat important	Important	Very important	Response Count
*Ability to collect pension or Social Security without penalty	22	56	131	392	601
*Ability to do meaningful, interesting or challenging work	23	78	195	303	
*Being able to stay involved with other people (i.e., social connectedness)	14	66	196	323	599
*Flexible work schedule	56	81	205	251	593
*Getting paid	43	87	156	310	596
*Health care benefits	19	38	78	466	601
*Option to work part time	59	143	221	174	597
*Opportunity to help improve the quality of life in your community	25	105	261	203	594
*The opportunity to mentor or train younger people	68	186	204	131	589
*Retirement benefits	26	39	91	440	596
*Situation that provides opportunities for growth and development	34	124	236	201	595
*Supportive work environment/culture	41	109	234	208	592
*Training or education opportunities	88	199	184	114	585
*Work that is different from your previous work (i.e., a change in career)	218	193	109	68	588
<i>answered question</i>					607
<i>skipped question</i>					16

5. Do you currently volunteer for any organization(s) or project(s) that help people in the community?		
Answer Options	Response Frequency	Response Count
Yes	56.1%	337
No (If No, skip to question #9 on page 4)	43.9%	264
<i>answered question</i>		601
<i>skipped question</i>		22
6. If so, approximately how many hours per month?		
Answer Options	Response Frequency	Response Count
1-5	41.2%	133
6-10	24.8%	80
11-15	10.2%	33
16-25	11.5%	37
26-40	7.1%	23
More than 40	5.3%	17
<i>answered question</i>		323
<i>skipped question</i>		300

7. How did you get involved in volunteering?		
Answer Options	Response Frequency	Response Count
*I am a long-time volunteer for an organization/cause I support	49.7%	164
*I am part of social group or club that does volunteer work	23.0%	76
*I responded to an ad or article	3.6%	12
*I sought out the opportunity because of a special interest or passion	33.9%	112
*I volunteer through a program at work	9.4%	31
*Someone I know got me involved	28.2%	93
*Other (please describe)	16.1%	53
answered question		330
skipped question		293

8. In volunteering, how important are each of the following as either motivation for or benefits of your volunteering?					
Answer Options	Not at all important	Somewhat important	Important	Very important	Response Count
*Develop leadership skills	97	85	86	52	320
*Do meaningful work that may lead to paid employment	168	97	36	20	321
*Feel productive	12	41	135	134	322
*Gain practical knowledge and skills	39	87	131	63	320
*Get "freebies" or opportunities in exchange for my time	216	67	33	5	321
*Have a flexible schedule	39	55	129	97	320
*Help my community	3	35	118	164	320
*Make a valuable impact to organization	9	54	120	136	319
*Mentor others	36	86	122	74	318
*Meet new people	28	97	132	65	322
*Obtain health benefits	183	51	41	38	313
*Use my special skills/expertise (e.g., legal, accounting, medical, marketing)	50	85	111	73	319
*Opportunity to do a variety of different activities	22	82	150	64	318
*Opportunity to follow a career ladder	216	65	28	9	318
*Provide direct service to clients	101	96	76	42	315
*Serve in a leadership role on a nonprofit board or commission	120	84	62	53	319
*Volunteer for an organization/cause that I care about	6	23	109	178	316
answered question					324
skipped question					299

9. If you don't currently volunteer, or don't volunteer as much as you would like to, what are the reasons? (Check all that apply)		
Answer Options	Response Frequency	Response Count
*Family obligations	51.1%	228
*I can't afford to volunteer	15.2%	68
*I do not care for the nonprofit organizational culture	4.3%	19
*I don't feel valued as a volunteer	3.8%	17
*I don't have time	62.3%	278
*I don't know how to get involved	13.2%	59
*I have had negative experiences as a volunteer	4.5%	20
*I would like to get paid	8.1%	36
*It's not a priority in my life	15.9%	71
*No opportunity to use my knowledge, skills and talents	4.0%	18
*Opportunities do not fit my schedule	33.0%	147
*Personal health problems	12.1%	54
*Volunteering does not satisfy my interests	6.1%	27
*Other (please describe)	10.3%	46
answered question		446
skipped question		177
11. If you plan to participate in lifelong learning opportunities in the next phase in your life, please check your primary motivations to participate. (Please check all that apply)		
Answer Options	Response Frequency	Response Count
*To have an opportunity to socialize and network	56.8%	274
*To increase pay	23.4%	113
*To learn for the love of learning	69.1%	333
*To maintain or augment current job skills	30.7%	148
*To prepare for different or new career	19.5%	94
*To learn for other reasons (please describe)	10.8%	52
answered question		482
skipped question		141
12. What types of learning opportunities would you be interested in pursuing? (Check all that apply)		
Answer Options	Response Frequency	Response Count
*Certificate programs (including continuing education units as well as learning technical and professional skills/knowledge in areas such as real estate, marketing, human resources)	31.1%	156
*College courses for academic credit	27.9%	140
*Distance learning (i.e., online courses or training)	33.3%	167
*Job training program (i.e., skills training employment assistance)	14.1%	71
*Lectures/symposium	36.9%	185
*Non-credit community education (enrichment and lifelong learning)	52.6%	264
*Professional development (i.e., courses in leadership, management, entrepreneurship)	31.7%	159

*Social events (i.e., informal gatherings of peers)	45.2%	227
*Travel experiences	63.9%	321
*Workshops/seminars	60.2%	302
*Other (please list)	4.2%	21
answered question		502
skipped question		121

13. As you contemplate the next phase of your life, please check any of the following issues in which you have a HIGH LEVEL OF INTEREST IN BECOMING PERSONALLY INVOLVED either through work, volunteering or education/learning. (Check all issues and all columns that apply)

Answer Options	Work	Volunteering	Learning	No Interest	Response Count
*Advocacy	89	165	88	185	450
*Arts and Culture	45	129	241	124	462
*Children's Issues	102	197	105	121	453
*Civic Leadership	61	154	80	201	437
*Disaster Relief	52	207	98	148	441
*Education Field	131	128	124	146	447
*Environment	57	151	167	135	440
*Faith-based Activities	62	211	108	141	446
*Health Care	75	103	156	157	430
*Helping Older Adults	62	218	117	122	450
*Homelessness	35	146	101	181	426
*Housing	47	86	97	210	416
*Human Rights/Social Justice	67	161	145	141	444
*International Aid	19	77	84	258	412
*Minority Issues	55	117	133	181	428
*Neighborhood Work	53	235	101	120	444
*Poverty	50	160	122	149	420
*Public Policy Work	63	101	104	203	410
*Women's Issues	61	159	139	155	437
*Youth	90	202	116	114	429
answered question					539
skipped question					84

15. Will you need to have job training or learn new skills in order to be successful in your next job, whether paid or volunteer?

Answer Options	Response Frequency	Response Count
Yes	19.1%	105
No	40.9%	225
Don't know	40.0%	220
If yes, describe the skills you will need to develop.		55
answered question		550
skipped question		73

16. What is your age?		
Answer Options	Response Frequency	Response Count
45-49	22.5%	126
50-54	23.9%	134
55-59	25.7%	144
60-64	17.7%	99
65-70	8.0%	45
Older than 70	2.1%	12
<i>answered question</i>		560
<i>skipped question</i>		63
17. Are you:		
Answer Options	Response Frequency	Response Count
Female	70.6%	393
Male	29.4%	164
<i>answered question</i>		557
<i>skipped question</i>		66
18. Are you:		
Answer Options	Response Frequency	Response Count
Never married	11.4%	64
Married	56.7%	318
Separated	1.4%	8
Living w/partner	3.0%	17
Divorced	20.3%	114
Widowed	7.1%	40
<i>answered question</i>		561
<i>skipped question</i>		62
19. What is your highest level of education?		
Answer Options	Response Frequency	Response Count
8th grade or less	0.0%	0
Some high school	0.7%	4
High school graduate or equivalent	11.5%	65
Some college	20.0%	113
Associate degree	10.1%	57
Bachelor degree	21.6%	122
Master's degree and beyond	36.0%	203
<i>answered question</i>		564
<i>skipped question</i>		59

20. In what zip code do you reside?

Within Wyandotte County 79%
Outside Wyandotte County 21%

The breakdown within Wyandotte County was:

66012	22
66101	22
66102	64
66103	19
66104	62
66105	1
66106	51
66109	121
66110	1
66111	17
66112	42
Total WyCo	422
<i>Answered Question</i>	531
<i>Skipped Question</i>	92

21. Which of the following best describes you:

Answer Options	Response Frequency	Response Count
American Indian/Alaska Native	0.9%	5
Asian	0.4%	2
Black/African American	15.6%	87
Hispanic/Latino	4.8%	27
Native Hawaiian/Pacific Islander	0.0%	0
White, non-Hispanic	74.7%	417
Self-identify	3.6%	20
<i>answered question</i>		558
<i>skipped question</i>		65

22. In 2007, what was your total household income from all sources before taxes?

Answer Options	Response Frequency	Response Count
Less than \$20,000	4.5%	24
\$20,000 to \$35,000	12.0%	64
\$35,000 to \$55,000	23.3%	124
\$55,000 to \$75,000	18.0%	96
\$75,000 to \$100,000	17.1%	91
Over \$100,000	25.0%	133
<i>answered question</i>		532
<i>skipped question</i>		91

23. If you are employed, are you the primary income earner in your household?		
Answer Options	Response Frequency	Response Count
Yes	61.6%	341
No	25.5%	141
Not Employed	13.0%	72
<i>answered question</i>		554
<i>skipped question</i>		69
24. Are you currently covered by health insurance?		
Answer Options	Response Frequency	Response Count
Yes	95.0%	532
No	5.0%	28
<i>answered question</i>		560
<i>skipped question</i>		63
25. If yes, are you covered by any of the following forms of health insurance? (Check all that apply)		
Answer Options	Response Frequency	Response Count
Medicaid	1.6%	8
Medicare	11.9%	61
Employer-based private health insurance	87.3%	446
Self-purchased private health insurance	8.0%	41
<i>answered question</i>		511
<i>skipped question</i>		112
26. Are you currently receiving Social Security benefits or a pension?		
Answer Options	Response Frequency	Response Count
Yes	17.8%	99
No	82.2%	458
<i>answered question</i>		557
<i>skipped question</i>		66
27. Are you currently responsible for caring for an aging family member or friend?		
Answer Options	Response Frequency	Response Count
Yes	23.4%	130
No	76.6%	425
<i>answered question</i>		555
<i>skipped question</i>		68
28. Are you currently responsible for caring for a child under 18 years old?		
Answer Options	Response Frequency	Response Count
Yes	20.4%	113
No	79.6%	441
<i>answered question</i>		554
<i>skipped question</i>		69

29. How long have you been living in the United States?		
Answer Options	Response Frequency	Response Count
All my life	94.3%	529
Less than 10 years	0.0%	0
11-25 years	0.4%	2
26-50 years	5.3%	30
<i>answered question</i>		561
<i>skipped question</i>		62
30. As you contemplate the next phase of your life, do you know where to go to find what is next for you (whether it be a job, a volunteering or service opportunity, or an educational experience)?		
Answer Options	Response Frequency	Response Count
Yes	51.2%	281
No	48.8%	268
<i>answered question</i>		549
<i>skipped question</i>		74
31. If yes, write in where you would go (please be specific):		
Answer Options	Response Count	
	206	
<i>answered question</i>		206
<i>skipped question</i>		417
<p>It is noteworthy that only 34% responded to this question although 51% responded in question 30 that they “know where to go to find what is next” for them. Of the responses, the vast majority were non-specific, that is, they did not identify a specific place but rather suggested “my church,” “networking” or “internet.” Highest-ranked “places” they would seek assistance in their pursuit of “what’s next” are local colleges and universities (27%) with community colleges specifically identified by many, the internet (25%) to search for volunteer, learning and work opportunities, churches (15%), public libraries (12%) and public schools and government resources (11%).</p> <p>From these responses, most people plan to use whatever resources (family, friends, nonprofits where they currently volunteer, etc.) to assist them in their searches. It remains to be seen whether those resources will provide the assistance they seek.</p> <p>Finally, there are implications for those organizations that are identified as the “go to” places for boomers in transition. Are the community colleges, churches, libraries, public schools and government offices ready to respond to the requests for assistance that will be coming their way?</p>		

32. Do you plan to participate in issues or causes you care about?		
Answer Options	Response Frequency	Response Count
Yes	85.6%	464
No	14.4%	78
<i>answered question</i>		542
<i>skipped question</i>		81
33. If yes, how do you plan to contribute to issues or causes you care about? (Check all that apply)		
Answer Options	Response Frequency	Response Count
*Volunteer my time	85.3%	401
*Work for a nonprofit	38.5%	181
*Engage in advocacy activities	39.1%	184
*Make financial gifts to issues, causes, or organizations I care about	57.9%	272
<i>answered question</i>		470
34. Retirement means different things to different people. What is it that YOU would like to do during the next phase of your life?		
Answer Options	Response Count	
	407	
<i>answered question</i>		407
<i>skipped question</i>		216

While some people do not expect to retire for financial reasons or have not decided yet what they will do when they retire, most people describe their desire for flexibility and choice/options to pursue their passions, and new kinds of work and learning; they also want to have the time to attend to family, personal, and community interests. The following is a sample of responses:

Have meaningful work to do on a flexible schedule that allows for health concerns and time to travel.

Have my time be my own and decide what service I want to provide.

I need to increase my income via work.

I would like to volunteer when possible, travel & spend time with son & his family.

I retired in 2002 and began working full-time again two years later, and that job I will continue working in until I can't any longer or the business goes under. At the same time, I volunteer my time and money for the school I used to teach at.

Do not expect to be able to retire.

Not worry about money and spend time with my family.

I haven't fully decided yet. I would like to blend work, volunteering, traveling, and enjoying my family and friends.

Help people navigate the medical world.

Make a positive difference.

Work part time, travel.

Work as long as I am physically and mentally able either voluntarily or for an agency. If I quit working I probably will become ill and die.

To work when I WANT, not because I have to.

Whatever I feel like doing.

Continue to be involved in a variety of issues, learning and crafting, reading, sharing time with family.

Work for Jesus.

Work part time, possibly with either elderly or disadvantaged populations.

Spend time with family, be financially secure as possible, work some, relax some, travel, hobbies.

Learn about areas that have interested me, but have not been directly related to my career.

Keep working but just not quite so much!

I'm not sure.

I would like to enjoy my life. I would like to be able to take time doing things. Diffuse the pressure.

35. What is your religious affiliation?		
Answer Options	Response Frequency	Response Count
Buddhist	0.4%	2
Christian	77.7%	417
Hindu	0.0%	0
Jewish	1.3%	7
Muslim	0.0%	0
Spiritual/nonaffiliated	10.8%	58
Other (please specify)	9.9%	53
<i>answered question</i>		537
<i>skipped question</i>		86
36. How did you learn about this Next Chapter Initiative survey?		
Answer Options	Response Frequency	Response Count
*Chamber of Commerce	1.3%	7
*Church, Temple, Synagogue	0.2%	1
*Community College	0.6%	3
*Friend	6.2%	34
*Newspaper	2.9%	16
*Public Library	17.2%	94
*Shepherd's Center of Kansas City, Kansas	7.5%	41
*Unified Government	36.9%	201
*United Way	0.2%	1
*Other (please specify)	27.0%	147
<i>answered question</i>		545
<i>skipped question</i>		78

National Promising Projects and Practices Description

The following innovative projects and practices have been highlighted for their relevance to the key findings from the Wyandotte County Boomer Survey and for the possible replication of partnership models and strategies.

Boston, MA

Discovering What's Next: ReVitalizing Retirement Newton, MA

www.discoveringwhatsnext.com

Overview:

A community-based organization birthed in 2002 that engages midlife and older adults in creative exploration of their next life stage, DWN provides connection and direction as well as opportunities for learning and community involvement. Current programming includes library forums, hands-on workshops, a film series and small group discussions (Transition Talks) in cafe-style settings.

The DWN HUB is a one-stop shopping center that enables those 55 and over to browse books, journals, and other print and web information on topics such as work, lifelong learning, health issues, civic engagement, financial planning, and leisure activities. Located in the Newton Free Library, the DWN HUB is a clearinghouse of information, direction and connection for those making the journey to or transition through retirement. Shelves are filled with books, periodicals, pamphlets, brochures and loose-leaf binders. HUB computers provide access to relevant online resources and databases.

The HUB is staffed approximately 20 hours a week by Transition Navigators™, a team of volunteers who help visitors figure out what they want and need, then identify how those needs can be met. Transition Navigators™ also provide information, evaluation, and recommendations about community resources.

Denver, CO

Colorado Boomers- Boomers Leading Change

Metro Denver

www.coloradoboomers.org

Overview:

In late 2006, Rose Community Foundation was among 30 U.S. Community Foundations selected to participate in The Community Experience Partnership (CEP), a national initiative supported by The Atlantic Philanthropies. CEP is a long-term initiative to spur innovation in the way experienced adults can be mobilized to address pressing needs in America's communities.

Booming increase

Denver boasts one of the highest concentrations of baby boomers of any major U.S. city, with 32.8 percent of the population falling into this category.

With a well-educated population of 55+ adults, Denver has the potential to serve as a laboratory for innovative and creative approaches to aging.

Recognizing that the baby boomers offer a large reservoir of human capital to address pressing social and economic needs, Rose Community Foundation's Boomers Leading Change initiative is designed to serve as a catalyst to energize and invigorate boomers as they reinvent a "new norm" for the way they – and those who follow – will live in their 60s, 70s, 80s and beyond.

Research

Rose conducted an assessment of metro Denver's 55-64 population in early 2007, resulting in several key observations:

- Most of the "experienced" generation will continue working past age 65, but they want employment with flexibility and meaning. Employers are not focused on employment issues for the 55+ worker.
- More than 70 percent say they plan to volunteer, and they have a wide range of interests. However, many feel that nonprofit organizations are unprepared to utilize their talents effectively.
- Nearly two thirds want opportunities to learn, mostly for the love of learning, but also to improve or obtain job-related skills.

Innovation Grants and Project Plans

The community assessment pointed to four promising action steps:

- Create connecting points and networks
- Restructure institutions and employment to attract boomers
- Develop a health-focused initiative spanning the areas of work, service and learning
- Explore various avenues of work force development

Moving forward

The vision of Rose's Boomers Leading Change initiative is that the front end of the baby boom generation will revolutionize both the perception and the reality of aging through productive, meaningful engagement in the community and the economy. For most, it means creating a balanced life that includes flexible employment, useful service and opportunities to learn.

But the barriers to achieving this vision are many and varied, beginning with the mindset of many boomers about the deficits that accumulate with aging. More substantive barriers include:

- Employment practices and policies
- Future income security
- Health status, health care and insurance coverage
- Insufficient capacity in the nonprofit sector to utilize highly skilled volunteers
- Scarce attention to the lifelong education needs of older adults among mainstream educational institutions.

Rose believes that the leadership, skills and motivation exist as key assets within the boomer cohort to confront these barriers and shape a new context for 55+ civic engagement.

In early 2009, with the guidance of a planning council, the Foundation expects to identify specific institutional change strategies within the public, private and nonprofit sectors that show the most promise for integrating the leadership, skills and talents of the boomer generation for social and economic benefit. Their charge will be to develop strategic programmatic solutions that connect to the larger vision of a movement that extends and amplifies the human capital of the boomer generation in service to the economy and the community. Specific areas of paid or unpaid service that offer the most promise are health care, public-sector employment and reforming nonprofit organizations' volunteer management practices.

Maricopa County, AZ

Boomerz

www.boomerzwork.com

Scottsdale, AZ

Overview:

One of four Next Chapter initiatives funded by the Virginia Piper Charitable Trust⁶ in 2004, Boomerz has developed a range of strategies that serve and engage boomers, especially around employment. Its re-careering programs provide a number of options to assist boomers who are looking for flexible employment opportunities. These unique programs all provide valuable tools to assist with job search whether boomers want to change careers, change jobs, work part-time, find flexible employment, work on projects, or return full-time to the work force. It offers the following programs:

Talent Acquisition Coffees: Host companies invite Boomerz members to presentations providing information about their company history, culture, job opportunities and benefits and interview Boomerz for available positions.

Boot Camps: Monthly programs that provide Boomerz members with information and guidance on preparing for job interviews, re-careering advice, etc.

Job Fairs: Geared specifically towards companies that are actively looking for boomers to fill their open positions.

Job Bank: Open only to members and to companies that are "Boomer-Friendly," this resource is designed not only for boomers who are looking for traditional positions, but also for those who are changing careers or interested in flexible work alternatives.

In addition, the Boomer-Friendly Workplace Initiative Project supports the re-careering programs by working directly with companies to develop strategies to attract, hire and retain Boomers in the workplace. The project is led by a

⁶ See more about the Piper Trust Next Chapter initiatives at www.pipertrust.org/initiatives/nextchapter.aspx

Steering Committee of six Valley companies with several additional Associate Partners. The goal is to establish a "Boomer-Friendly" certification program and connect these "Boomer-Friendly" companies with Boomerz members who are seeking employment opportunities.

Tempe Connections

www.tempeconnections.org

Tempe, AZ

Overview:

A second Next Chapter grantee of the Virginia Piper Charitable Trust (2004), *Tempe Connections* is a nonprofit community service program and Café tucked in a quiet corner of the Tempe Public Library. It's a warm and inviting spot to relax over a steaming latte while surfing the net or reading a magazine. But it's much more than a full-service coffee bar.

Affiliated with the Friends of the Tempe Public Library, the proceeds from the Connections Café support programming and community involvement activities for baby boomers and older adults. There are classes in financial planning and wellness, seminars on life planning and career coaching – all the tools to help 50+ adults grow, retool and live happier, more fulfilling lives.

It's not just about baby boomers. The hallmark of *Tempe Connections* is giving back to our community. We connect people with volunteer opportunities that enrich our neighborhoods and schools.

Tempe Connections partners include more than two dozen organizations: Arizona State University Department of Continuing Education, St. Joseph's Hospital, the Tempe Chamber of Commerce, the Southwest Institute of Healing Arts, the Boys and Girls Club of the East Valley-Ladmo Branch, the Tempe Elementary School District #3, and Changing Hands Bookstore.

Tempe Connections provides a wide variety of small-fee or no-fee learning programs for adult participants:

Academic Connections: Learn for the Love of Learning

In this program, Tempe Connections partners with the ASU Osher Lifelong Learning Institute to offer a diverse repertoire of intellectually stimulating short courses, lectures and workshops taught by ASU Emeritus/Emertia faculty, community college professors and career professionals in its program.

Transition Talks: Prepare for the Next Chapter of Life

In this series of free presentations and discussions, you can plan for a variety of life changes like post-career options, caring for aging parents and financial considerations.

Philadelphia, PA

Coming of Age **Metro Philadelphia with national replication**

www.comingofage.org

Overview:

Coming of Age is a Philadelphia-based national initiative funded in part by The Atlantic Philanthropies⁷ (2006) to promote age 50+ civic engagement. It is a partnership of The Temple University Center for Intergenerational Learning, WHY? Wider Horizons, AARP Pennsylvania, and United Way of Southeastern Pennsylvania.

Coming of Age offers programs and resources to help people 50+ explore and discover the best path to a fulfilling and engaged future. These include:

The Inspiring Opportunities e-blast

Weekly, free e-publication that offers:

- A "What's New" section about the latest trends in life after 50
- A calendar of community events where you can learn and find ways to make a difference
- A listing of paid and unpaid opportunities at nonprofits and government agencies in the Philadelphia area; and notices about special events.

Invitations to Boomervision!®

- Boomervision! is a lecture and community dialogue series that invites authors and experts to share their ideas and engage the audience in discussions on diverse topics of interest to people 50+. Topics covered in past Boomervisions! include brain health, relationships, social entrepreneurship, storytelling, and building community. These programs are held at Coming of Age founding partner public broadcasting station WHY?.

Make a Big Difference Teams

- Teams of volunteers are brought together to address a project focused on a community issue. A newly created team is made up of Temple University alums, age 50+, who are acting as guides to international students. Another Make a Big Difference team is helping people with low incomes file for tax returns and benefits for which they are eligible.

Programs

Explore Your Future

A series of multi-session, professionally-facilitated, non-financial transition discussions held on-site at a workplace and in a variety of community settings (e.g., libraries, senior centers, and faith-based institutions).

⁷ See more about The Atlantic Philanthropies Ageing Programs at www.theatlanticphilanthropies.org/ageing

Explore Your Future Book Club

Participants, led by a facilitator, meet in community settings to engage in substantive discussions about compelling 50+ issues.

Work with Diverse Communities

Coming of Age is committed to engaging people 50+ in diverse communities in compelling roles and strengthening organizations in those communities. The initiative has partnerships with African American, Latino, and Southeast Asian organizations on community-building projects available. Information about these projects is available for replication without charge.

Training

- **Capturing the Energy & Expertise of People 50+ Learning Lab**
A six-session program for nonprofits that focuses on who people 50+ are today, how to craft and market compelling opportunities for them, recruitment strategies, managing an intergenerational workforce and action planning.
- **Cutting Edge Strategies for Senior Centers**
This training helps senior centers explore new identities, attract broader audiences, develop civic engagement opportunities, create learning opportunities, seek funding, and improve marketing strategies.
- **Capturing Experience**
This online course allows nonprofits to work at their own pace and explore a curriculum for leveraging the talents, skills, and passions of people 50+.
- **Nonprofits and government agencies**
COA helps local, regional, and national organizations pursue their missions by training them in how to infuse the skills, talents, and passions of people 50+ into their work.

Portland, OR

Life by Design Northwest

www.lifebydesignnw.org

Metro Portland

Overview:

A multi-partner coalition funded in part by The Atlantic Philanthropies (2007), the mission of Life by Design Northwest is to support people as they age through the discovery of their passion and purpose, and to engage their wisdom and skills to both strengthen community and achieve personal fulfillment.

Program components will include online assessments and in-person workshops and classes to support people in self-discovery and fulfillment assistance - including financial and health resources, and assessment tools; web-based tools and one-on-one coaching support; web-based resources, resource experts, volunteer and civic engagement opportunities, and employment. In addition, the following elements will be important support components: workplace redesign in creating and implementing practices to

increase both employee and volunteer involvement and satisfaction in nonprofit organizations and public relations efforts to promote the ease of a one-stop location (physical and virtual).

Partners: Portland Community College (lead agency), Hands on Greater Portland, Multnomah County Public Library, Oregon Public Broadcasting, Portland State University, AARP Oregon, Express Personnel and NW Natural.

Programs

Discover, Engage and Design Your Future

This six-week workshop leads participants down a path of self-discovery towards uncovering their values, interests, and skills. Participants explore meaningful ways to finding life balance, forgoing a path of civic engagement, and creating goals that propel them into their future.

Coffee and Conversation Networking Nights

Monthly get-togethers for mid-career professionals and anyone in transition who is interested in meaningful (paid and unpaid) work to discuss a topical theme, brainstorm ideas, network with peers and share resources.

Affinity Groups

Life by Design NW and partners at Hands On Greater Portland and the Multnomah County Public Library have formed Affinity Groups for older adults. These groups meet monthly to share concerns, opportunities and resources related to transitional issues such as community engagement, retirement or work transition. These are self-discovery groups with an action focus.

Brooklyn, NY

ReServe, Inc.

www.reserveinc.org

New York City

Overview:

ReServe, an independent nonprofit funded in part by The Atlantic Philanthropies (2007) connects experienced retired professionals with compensated service opportunities that challenge them to use their lifetime skills for the public good. *ReServe* is working to educate civic institutions about the experience and wisdom that retirees can bring them, to work with the institutions to create service opportunities, and to recruit, place and support retired professionals in the workplace. Its ultimate goal is to bring fulfillment to the lives of retirees and to strengthen the institutions, the communities and the populations they serve.

ReServe specifically targets educated adults, serves them as direct clients, arranges stipends and works with nonprofits to identify service opportunities. Among its functions are:

- Provide civically-minded institutions across New York City the opportunity to take advantage of a grossly underutilized resource: the skills provided by retired professionals. It reviews each organization that submits an application and matches it with the right candidate to help that organization to meet its goals.
- Give organizations the chance to make a good match for themselves directly through the Opportunity Board. Once access is granted to our online database of retired professionals (*ReServists*), an organization can find the ideal candidate to match its needs.
- Provide stipended part-time positions in the nonprofit and public sectors. Rather than serving on a volunteer basis, all positions require a commitment of \$15 per hour on the part of the partner organization. Once expenses are taken out, *ReServists* are paid \$10 per hour for their work. This policy arises out of the philosophy that a monetary agreement will both ensure the seriousness of the assignment as well as the quality of service provided.
- Work with organizations to offer a variety of project-based and long-term opportunities as meet your needs. Organizations work with the *ReServist* to develop a regular schedule tailored to the mutual needs of both parties.
- Monitor each placement, checking in from time to time to make sure everything is going well.
- Place *ReServists* on *ReServe's* payroll, requiring any organization taking on the services of a *ReServist* only to sign a timesheet twice a month and paying the related invoices to *ReServe*.