



# Making the Connection: SaYES to Intergenerational Service-Learning

SaYES: Seniors and Youth Engaged in Service

Corporation for  
**NATIONAL &  
COMMUNITY  
SERVICE** 



*Making the Connection:  
SaYES to Intergenerational Service-Learning*

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## I. SaYES Overview

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### What is SaYES?

SaYES—Seniors and Youth Engaged in Service—is a joint initiative of Learn and Serve America (LSA) and Senior Corps. These are programs of the Corporation for National and Community Service, an independent federal agency created to connect Americans of all ages and backgrounds with opportunities to give back to their communities and their nation.

Learn and Serve America supports and encourages students and community members engaged in service-learning throughout the United States. Through Learn and Serve projects, over one million students make meaningful contributions to their communities while gaining academic and civic skills and an ethic of lifelong community service.

Senior Corps connects adults age 55 and over with the people and organizations that need them most. Senior Corps offers several ways to get involved through RSVP, Foster Grandparent, and Senior Companion programs. Senior Corps volunteers become mentors, coaches or companions to people in need, or contribute their job skills and expertise to a variety of community projects and organizations.

The Foster Grandparent Program and Senior Companion Program place volunteers in direct service only. Foster Grandparents serve children with special or exceptional needs, while Senior Companions provide services to adults—primarily frail seniors—who need additional support to remain independent in their own homes. Foster Grandparents and Senior Companions must be age 60 and over, and those who meet income eligibility criteria receive a small hourly cash stipend to help offset the cost of volunteering.

This guide and its contents specifically focus on Senior Corps' RSVP program as the community partner capable of recruiting volunteers age 55+ to serve in service-learning settings. This is because RSVP, the largest Senior Corps program, was designed with maximum flexibility of schedules and types of volunteer activities.

The Corporation created the SaYES initiative specifically to connect Senior Corps volunteers, particularly Baby Boomers (born from 1946-1964), with K-12 service service-learning activities and programs. Strengthening this linkage makes good sense. Senior volunteers are valuable but underutilized resources for service-learning programs, and they have the potential to support service-learning in many ways. Adults aged 50+ can help coordinate the logistics of service projects, assist with program administrative duties, establish and maintain community/school relations, facilitate student reflection, and assist teachers with integration of service-learning into the curriculum and other school programs. The leading edge of the Baby Boom generation turned sixty in 2006 and is a growing, active, senior adult volunteer resource with talent, skills, and wisdom to tap.

## About This Guide

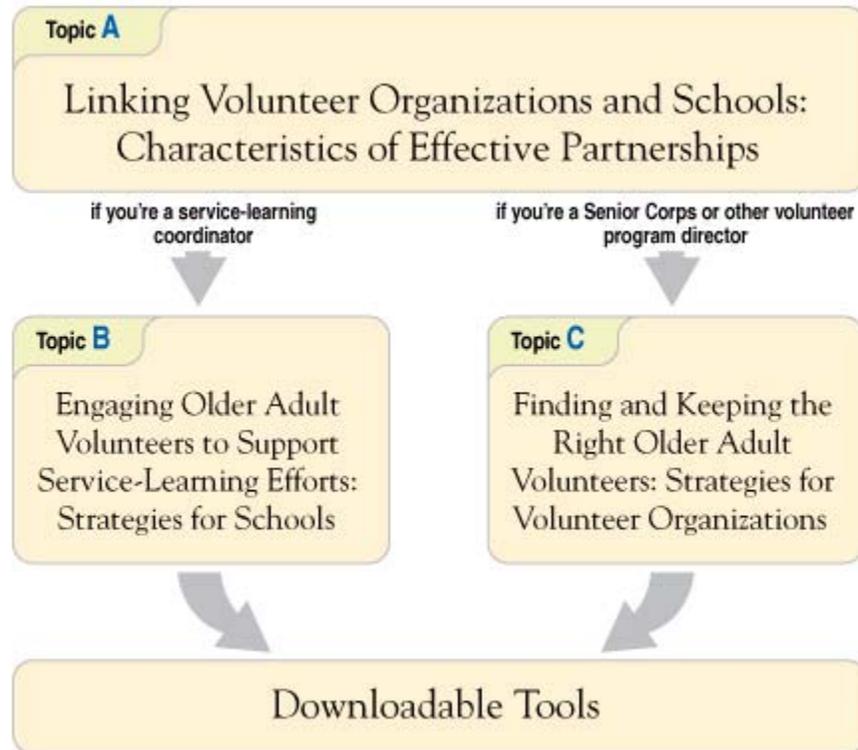
This publication is an adaptation of the SaYES online course, *Making the Connection: SaYES to Intergenerational Service-Learning*, accessed through the National Service-Learning Clearinghouse ([www.servicelearning.org/resources/sayes/index.php](http://www.servicelearning.org/resources/sayes/index.php)). The online course was created by the Northwest Regional Educational Laboratory (NWREL) and ETR Associates with funding from the Corporation for National and Community Service.

These products were designed to help both Learn and Serve sub-grantees and Senior Corps' RSVP directors and coordinators forge effective partnerships. The content is intended to be useful to other youth-program coordinators involved in service-learning and other 55+ adult volunteer program managers as well.

The printed guide has three chapters that correspond to the learning topics of the online course:

- Linking Volunteer Organizations and Schools: Characteristics of Effective Partnerships
- Engaging Older Adult Volunteers to Support Service-Learning Efforts: Strategies for Schools
- Finding and Keeping the Right Older Adult Volunteers: Strategies for Volunteer Organizations

You will also find appendices that include handouts, forms, templates, and marketing tools to assist you in turning learning into action. There is also a list of references used to create these materials that will lead you further into the topics presented. Use these as training or discussion materials and to help you move toward a partnership designed for your particular context.



## What is Service-Learning?

It's important before you delve into the major sections ahead that you have a good understanding of service-learning.

- Service-learning is a teaching and learning strategy that integrates meaningful community service with academic study.
- Service-learning combines service objectives with learning objectives.
- Service-learning is structured; reflection time enriches and informs the service-learning experience.
- With service-learning, youth and community stakeholders have a voice in and impact on the process.
- Through service-learning, participants acquire new skills and knowledge, and have the opportunity to strengthen communities and to explore values, such as civic responsibility and caring for others.
- Service-learning shares results and recognizes or celebrates work well done to motivate students and other participants to continued learning and community involvement.

**Effective service-learning:**

- Provides an opportunity for students and others to respond to real needs and assets in the community, as identified by all stakeholders in the service-learning partnership. The scale can range from local to global.
- Extends learning from the classroom into the community and allows students to use skills and knowledge in real-life situations.
- Links explicitly to academic curriculum and content-area standards.
- Offers opportunities for reflection on service and facilitates exploration of the importance of and opportunities for engagement in citizenship and service to community as a lifelong value.
- Devotes careful attention to planning and to interaction with collaborators so that all partners (including community members) work together successfully to meet their goals and needs.
- Develops relationships over time as a result of the service-learning experience.

**Service-learning is *not*:**

- Stand-alone volunteer activity
- An add-on to existing curriculum
- Minimum service hours to graduate
- Service assigned as punishment
- Only for students
- Only for older students
- One-sided (students and communities give *and* receive)
- Community service without the learning component

### For More Information About Service-Learning:

- Visit the National Service-Learning Clearinghouse ([www.servicelearning.org/](http://www.servicelearning.org/)). Explore the definition, history, and more resources related to implementing high-quality service-learning.
- To quickly find out more about service-learning, download: *Students in Service to America (SISTA): A guidebook for engaging America's students in a lifelong habit of service* at: <http://studentsinservicetoAmerica.org/download/guidebook.org>.
- The National Youth Leadership Council provides a two-page handout, *The Service-Learning Cycle*, ([www.nylc.org/rc\\_downloaddetail.cfm?emoid=14:281](http://www.nylc.org/rc_downloaddetail.cfm?emoid=14:281)), that nicely illustrates service-learning as a process.

### Who are Baby Boomers?

Older adult volunteers have long served in schools as mentors, tutors, and general helpers. The SaYES Initiative is encouraging you to think about involving older adult volunteers to support service-learning, and to consider the skills and talents of a segment of the older adult volunteer population garnering particular attention lately: Baby Boomers.

Before you get into strategies for partnering and the nuts and bolts of recruiting Baby Boomer volunteers for service-learning, you should also know some things about the Baby Boomer generation that you want to enlist.



Demographers tell us that Boomers—those born between 1946 and 1964—bring a diverse array of skills, the energy and motivation to tackle social issues and other community problems, and the desire to make a difference. Many Boomers want to use the knowledge and expertise they gained during years of employment to use in new ways, while also meeting their own needs for fulfillment.

In 2005, nearly one-third of Boomers volunteered, according to an annual Bureau of Labor Statistics survey released in December 2005. They gave a median of 51 hours a year, or about one hour a week, making them the most active volunteers after people older than 65.

Baby Boomers aren't a monolithic group. Like every other generation, there are commonalities and differences among them. What might be important to understand about Boomers to recruit them and place them in roles to serve effectively as service-learning volunteers? Take a look at these documents and consider the nuances of the Baby Boomer generation:

- Boomer Cohorts and Formative Experiences (see Appendix A)
- Quick Facts About Baby Boomers (see Appendix A)
- Boomer Differences: One Size Does Not Fit All (see Appendix A)

## How Can Boomer Volunteers Support Youth Engaged in Service-Learning?

Baby Boomers can offer support to academic and service-learning goals in a range of capacities. Below are some of the many ways Boomer volunteers can support service-learning:

- **Work on school/youth program relations with the larger community**  
RSVP volunteer June Feldman, newly retired from a local public relations firm in Portland, Maine, was recruited to help high school science teacher Mike Slocum prepare and distribute a student-designed brochure to tell local environmental engineering firms about job shadow opportunities. Students engaged in a service-learning project focused on environmental issues will engage in the job-shadows as part of their project.

- **Assist teachers/youth leaders in integrating service-learning into the school curriculum**

In a San Francisco Bay Area SaYES project, several newly retired members of the local carpenters' union came to the middle school to help the social studies teacher develop a unit on civic and community responsibility. Their design and construction expertise enabled the teacher and students to plan and construct a wheelchair ramp for a community member. One of the retired carpenters, Amy Lo, also utilized her interest in digital media to work with students to create a short film to document the project.



- **Help students reflect on their service**

Gloria Cruz, in her early 60s and a part-time composition instructor at a Texas community college, was recruited by her local RSVP project to facilitate a story-based reflection activity for high school students completing a service-learning project building a picnic shelter in a local park. This short-term assignment was perfect for Gloria, who is still employed and doesn't have as much time as she'd like to volunteer but would like to help students develop as writers.

- **Coordinate logistics**

With an interest in helping the school with a volunteer effort, Brandy Clark, the local part-time school bus driver, decided to help in her granddaughter's 5th grade class by contributing her time to drive the rented bus to the Florida coast for the annual beach clean-up service day. She also helped with student supervision and worked with another SaYES volunteer after the visit to facilitate the students' reflection process.

- **Assist in developing service content**

A high school service-learning coordinator in Arizona enlisted Emily Fassindon through a local RSVP project to help the student council class develop plans for upcoming student body elections. Ms. Fassindon had just switched to working part time at her job as an assistant to a state legislator, and wanted to do some related volunteer work. She helped students reflect on ways to improve voter education, to focus the elections on issues, rather than student popularity. As a follow-up to the student elections, Ms. Fassindon continued to assist the student council, which decided to research, write, and disseminate a voter education pamphlet about immigration issues in the community.

- **Assist with program administrative duties**

When an elementary school in central Ohio needed to raise money to fund its annual service-learning project, John Crangoskowicz, semi-retired owner of the local sporting goods shop, offered to organize a Jump-A-Thon. He helped each classroom organize teams of youth to jump rope, acted as a liaison to the parent association to ensure parents were on hand to distribute water and refreshments, and secured first-aid kits. He also donated jump ropes, and a printed T-shirt for each jumper. To streamline the school's service-learning fundraising for the following year, John documented project steps, volunteer hours, supplies, and expenses in a short report to the school principal.

## II. Effective Partnering: Linking Volunteer Organizations and Schools

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### Introduction

This section is written especially for:

- Learn and Serve America sub-grantees and other school-based service-learning coordinators
- Senior Corps' RSVP project directors and others who recruit and place older adult volunteers

The section focuses on developing collaborations:

- Between schools and volunteer organizations to support K-12 service-learning
- That aim to include Baby Boomers as volunteers

You will find concepts and tools that can help you work hand-in-hand with partners toward the common goal of enlisting older adults to assist youth engaged in service-learning.

### What is a Partnership?

Partnerships may mean different things to different people, so it's important to clarify different ways of working together.

In general, a partnership is:

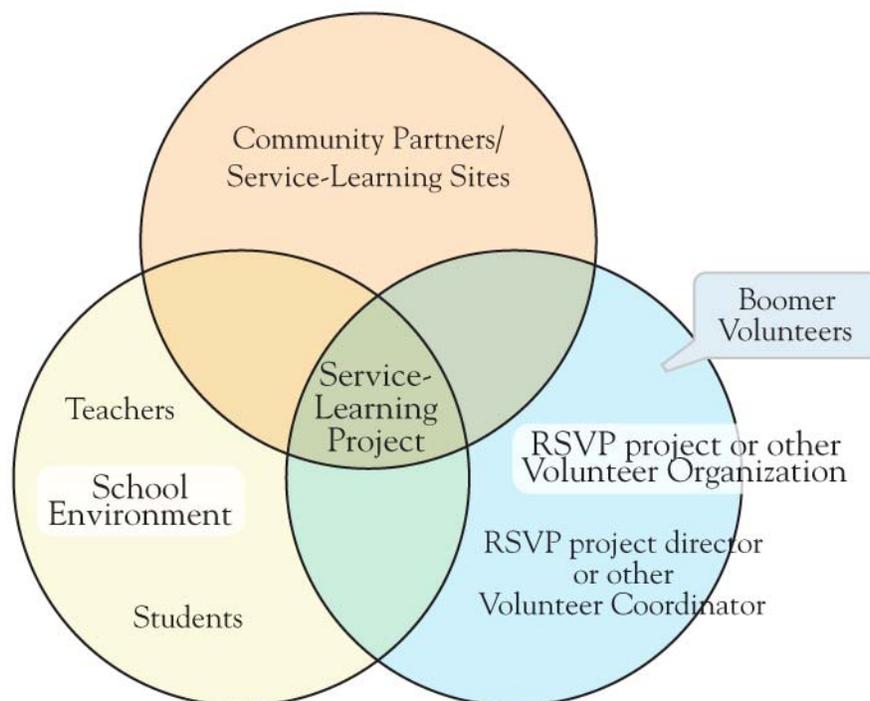
*The association of two or more people in an organizational setting formed for the purpose of accomplishing a specific goal or goals.*

A service-learning school and a senior volunteer organization are likely candidates for a partnership. Both are involved in enlisting human and other resources toward community good. That area of overlap is where a SaYES partnership can be fostered. Most service-learning projects already involve one or more community partners.

In this chapter, we focus on another dimension of partnership, that between a service-learning classroom and an RSVP project or similar volunteer organization. The illustration that follows shows how partners intersect with service-learning as the focus.

Review the diagram. Where do you or your organization fit in a SaYES partnership? *Reflect* on where you fit in and what role you can play in a SaYES partnership.

# Partnerships to Include Boomer Volunteers in Service-Learning



## Defining Partnerships

### Things To Think About For a Better Match

Some important things to consider as you define your partnership are:

- All ways of partnering can be worthwhile—no one type is better or worse. Choose the arrangement that makes most sense for achieving your goals.
- Be realistic in thinking about partner capabilities. This can help you design the type and scope of partnership that is best for your school and organization.

Potential partners who put some effort into partnership design are more likely to reap the benefit of good working relationships down the road.

The chart that follows shows partnership types and their characteristics and highlights differences among various partnering types. Partnering may mean different things to different people. It's important to have some definitions to clarify different ways of working together.

Discuss and work together with potential partners to choose how your work will be structured. The way you design your partnership depends on your purpose, context, and people. Remember: All ways of partnering can be worthwhile.

See partnership types and characteristics in the **Defining Partnership Chart** to:

- Understand various types of partnering arrangements possible
- Support a discussion that helps you clarify internally or with a potential partner what type of partnering is best for your goals and context
- Help you craft an appropriate partnering arrangement

PARTNERSHIP TYPE	CHARACTERISTICS			
	Commitment	Formality	Personal Contact	Autonomy
<p><b>Communication</b> Least committed level of partnering. Includes sharing information and non-material resources as key purposes.</p>	<p><b>LOW</b> (Verbal commitment to work together if opportunity arises)</p>	<p><b>LOW</b> (No set joint procedures for aspects of shared work)</p>	<p><b>LOW</b> (Little or no interaction between partners)</p>	<p><b>HIGH</b> (Each partner operates its own program with little thought of what other partner doing)</p>
<p><b>Coordination</b> Activity between two or more agencies/organizations, often to prevent duplicating efforts and to assure a service is provided.</p>	▼	▼	▼	▲
<p><b>Cooperation</b> Slightly more intensive. Activity between two agencies/community sectors designed to integrate some operations, yet autonomy of either party is not sacrificed.</p>	▼	▼	▼	▲
<p><b>Collaboration</b> Most intensive level of partnering. A mutually-beneficial, well-defined relationship involving people in different agencies/community sectors joining together to achieve a common goal. Usually, the goal couldn't be achieved efficiently (or at all) by one organization. Result is a highly-shared endeavor; members often commit as much to common goal as to interests of own organizations.</p>	<p><b>HIGH</b> (Memorandum of agreement exists between partners)</p>	<p><b>HIGH</b> (Established procedures for handling any disputes)</p>	<p><b>HIGH</b> (Regularly scheduled partner meetings)</p>	<p><b>LOW</b> (Partners consult with each other regularly to plan each organization's schedule)</p>

Adapted from: Campaign Consultation, Inc.

## What Characteristics Do Successful Partnerships Share?

There's more to partnering than just linking up with another organization. What does it take to partner well? Successful partnerships share three important characteristics:

- **Trust:** Service-learning is reciprocal. For SaYES partnerships to work, partners involved need to rely on each other's expertise to create a process that respects and acknowledges the contributions of all collaborators. A reciprocal process empowers all partners and participants.
- **Shared vision:** Service-learning is designed to respond to community-identified needs and assets.



Collaboration between two entities should be done with each other, not to one another.

- **Commitment:** Effective partners understand that neither meaningful learning nor community service happen quickly and easily. Commitment at both person-to-person and school-to-organization levels is key. Commitment of individuals and organizations provides a partnership with strength, like links forming a chain, to persevere and work through challenges along the way.

### Factors Influencing Successful Collaboration

Various factors have been shown to influence the success of a collaboration. The bulleted items in the chart below are positive indicators that can help you determine whether you're on the right path.

# Collaboration: These Factors Influence Success

## Environment

- There's a history of cooperation in the community
- Group(s) to collaborate seen as leader(s) in community
- There's a favorable political/social climate

## Collaboration Membership Characteristics

- Mutual respect, understanding, trust
- Appropriate member cross-section
- Members see collaborating in their self-interest
- There's ability to compromise

## Process and Structure

- Collaborators share a stake in both the process and the outcomes
- There are multiple layers of decision-making
- There is flexibility in structure and in the process
- Clear roles and policy guidelines are developed
- Process and structure are adaptable
- Appropriate pace of development

## Communication

- There is open and frequent communication
- Collaborators established informal (personal) and formal communication links

## Purpose

- Collaboration has concrete, attainable goals and objectives
- Collaborators have shared vision of purpose
- Collaboration has a unique purpose (doesn't duplicate)

## Resources

- Funds are sufficient
- Collaboration has quality leadership

• Source: Mattessich, P.W., Murray-Close, M., & Monsey, B.R. (2001). *Collaboration: What makes it work* (2<sup>nd</sup> edition). St. Paul, MN: Amherst H. Wilder Foundation

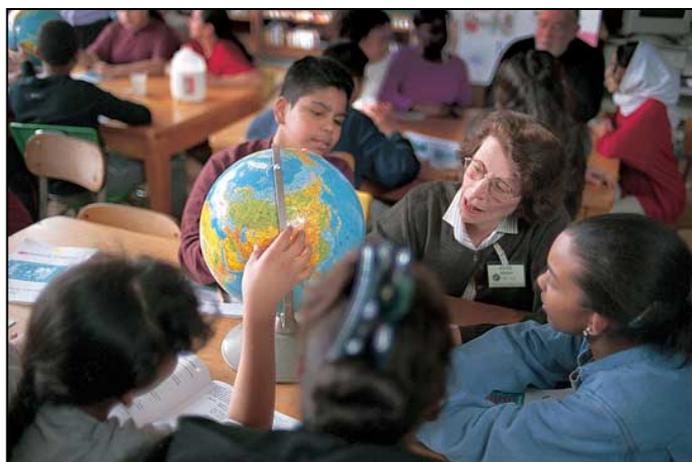
• You may wish to access and complete the Wilder Collaboration Factors Inventory tool at: [http://surveys.wilder.org/public\\_cfi/index.php](http://surveys.wilder.org/public_cfi/index.php)

## Seeking Potential Partners

### **Do the Potential Partners Fit in Relation to the Service-Learning Project?**

SaYES partnerships can flourish when service-learning projects enhance a school's current curriculum, the volunteer organization's goals, and the interests and desires of volunteers themselves.

As you begin the task of seeking a potential SaYES partner in your community, use the worksheet *Questions About Adult Roles, Volunteer Support, and Physical Needs* (see Appendix B). This activity will help you define what is needed for your project so your search for a partner can be focused. Going through this process can help you articulate needs to potential partners as well.



### **Understand the Basics About Schools and About Volunteer Organizations**

One step in connecting with prospective partners is a community scan. The goal of a community scan in the context of your SaYES partnership is to make the best match of programs and talents possible to support students in service-learning.

Before conducting a community scan, however, school staff members and those in volunteer organizations need to realize that, although they are based in the same community, each agency operates in its own realm—the worlds of schools and volunteer organizations aren't the same.

People in each realm will do better locating the best partners and working together successfully if each understands some basics about the world of the other.

### **What Should Schools Know About Volunteer Organizations?**

Schools should know that RSVP projects and other community-based volunteer organizations:

- Focus on advocating for or meeting community needs. The goal is to do something for the community or to affect change.
- Frequently operate in a climate of consensus and high input from constituents. Volunteer organizations tend to take on projects despite the odds and funding availability because they are needs-oriented.
- See involving youth in service-learning and adults as volunteers as a means of addressing community needs with community assets.
- Have established routines for recruiting, training, placing, and supporting volunteers.
- Schedule volunteer work around the service needs in the community.

- Occasionally provide transportation to volunteer service sites.
- Measure success by the completion of the service or product and the impact on service recipients and volunteers.

### **What Should RSVP Projects and Other Volunteer Organizations Know About Schools and Service-Learning?**

Volunteer organizations should know that Learn and Serve America sub-grantees and other schools involved in service-learning:

- Focus on learning and student outcomes, in addition to community assets and needs.
- Have established procedures, based on legal and curriculum responsibilities. School personnel must meet credential requirements and undergo extensive background checks. Volunteers working in schools may also be subject to screening.
- May have established routines for training and involving volunteers, or may prepare and support volunteers informally.
- Schedule volunteer work around the students' or school's needs and hours. Classroom teachers have limited time to plan or communicate with staff from other organizations.
- Consider transportation to service-learning sites an important issue as it is a direct cost, involves liability, and requires planning.
- Measure success by learning outcomes (what students know and are able to do).
- Evaluate success through assessment of student learning and skills development. Assessed student work may include reflective writing, portfolios, creative projects, small-group or individual presentations, or written tests.

#### **For More Information**

These resources can provide more information about negotiating the different organizational cultures of schools and volunteer/community organizations:

- *Civic Engagement and Service-Learning: Building community through service-learning: The role of the community partner.* Download a copy at: [//www.fsu.edu/~chesp/articles/ECS%20Role%20of%20the%20Community%20Partner.pdf](http://www.fsu.edu/~chesp/articles/ECS%20Role%20of%20the%20Community%20Partner.pdf)
- *Savvy Traveling: Volunteers engaging with school culture.* Available at: [www.nationalservicerresources.org/sites/learns/tutor/fall2004/fall2004.pdf](http://www.nationalservicerresources.org/sites/learns/tutor/fall2004/fall2004.pdf)

## Conducting a Community Scan: Steps for the Volunteer Organization

An RSVP or other volunteer program director looking for school placement sites can start by:

- Looking at a list of Learn and Serve grantees in your state or region ([www.servicelearning.org/nslc/lisa\\_page/websites.php#K12CBO](http://www.servicelearning.org/nslc/lisa_page/websites.php#K12CBO)). These are schools and organizations funded by the Corporation for National and Community Service to carry out service-learning projects.
- Contacting state education departments and agencies (SEAs). (For an online listing, see: [www.statelocalgov.net/50states-education.cfm](http://www.statelocalgov.net/50states-education.cfm)). Also contact local school districts (LEAs). (For schools/districts in your area, search: <http://nces.ed.gov/ccd/schoolsearch/>). When you make contact:
  - Ask the service-learning contact whether there are service-learning activities already established in your locale.
  - Inquire about service-learning requirements for certain grades, schools, districts, or even statewide.
  - Ask district administration offices which schools/staff members are currently doing service-learning.
- Looking for schools that might be potential partners based on their focus. Ask yourself:
  - What grade level might be most appropriate? Is there a reason to seek out an elementary, middle, or high school?
  - Does the school attendance area make any difference? A school may draw from one or several nearby neighborhoods, or it could be a magnet school that brings students from all over the community.
  - Is there a special focus or program within a school that aligns well with your mission and goals? A high school with a career academy and health careers pathway, for example, or an elementary school with a focus on language learning.

### **Tip: Assessing High-Quality Volunteer Placement Sites**

Assessing the volunteer placement site—the educational setting or program in which volunteers will be placed—is an important task for a volunteer program manager. This guide includes a *Checklist for Assessing Quality of the Volunteer Placement Site* (Appendix B) to help you assess the suitability of service-learning sites for the volunteers you recruit.

## **Conducting a Community Scan: Steps for the Service-Learning Site**

If you are a teacher or service-learning coordinator looking for organizations that can provide volunteers, here are some key steps you can take:

- Begin by contacting your local RSVP. A program of Senior Corps, RSVP connects volunteers age 55 and over with service opportunities. Find contacts in your area by entering your state name on the RSVP Web page ([www.seniorcorps.gov/about/programs/rsvp.asp](http://www.seniorcorps.gov/about/programs/rsvp.asp)).
- The Points of Light Foundation ([www.pointsoflight.org/centers/find\\_center.cfm](http://www.pointsoflight.org/centers/find_center.cfm)) hosts the Volunteer Center National Network Web site. This includes an online directory where you can locate organizations that provide volunteers to communities for a variety of purposes.
- Consider tapping the various civic and adult volunteer organizations in your community, such as the local chapters of the Lions, Kiwanis, League of United Latin American Citizens (LULAC), Urban League, and Optimists (they focus on youth), to name a few.
- Contact your public library system for information about local adult volunteer resources.
- The United Way, Volunteers of America, and scouting organizations may also be good sources for connecting to those who recruit mature adult volunteers in your area.
- Look into government and business employers in your community. Contact the human resource office to inquire whether the business grants employees release time for volunteer activities.

## Establishing the Partnership

### Starting the Partnership

Once you've accomplished your scan and made connections with a willing partner, it's time to set up your SaYES partnership. Depending on the needs of the organizations involved, your SaYES partnership may be very informal or more structured. Determining what's most appropriate will involve conversations between prospective partners about the parameters of the relationship.



You will need to discuss and agree on the:

- Roles each organization will play
- Roles and tasks of specific staff in implementing the partnership
- Roles for students and volunteers in the partnership

See the *Defining Partnership Chart* (p.12) for more information.

This list of *Questions About Partner Roles in a SaYES Partnership* may help you discuss and decide on these roles within your own organization and, then, with your partner:

### Questions About Partner Roles in a SaYES Partnership

The following questions will help you think about the roles organizations and people will play in your proposed SaYES partnership.

- Questions about the roles each organization will play
  - What type of partnership are we interested in?
  - Who takes responsibility for what? Does the school take responsibility only for curricular aspects? Does the volunteer organization take responsibility only for volunteer recruitment and placement? What other key roles need to be assigned?

- Questions about the roles and tasks of specific staff in partnership implementation
  - What are the roles and tasks to be performed?
  - How will leadership roles be defined? Will leadership be shared?
  - Do you wish to assign staff to teams within or across partners?
  - Are there some staff roles or tasks that function across the entire effort to support service-learning?
  
- Roles for students and volunteers in the partnership
  - What roles are appropriate for the age and developmental level of the students?
  - What roles are appropriate for volunteers? Do some roles involve working directly with students? Are there other roles for volunteers as well?
  - What types of volunteer screening requirements are in place? Whose responsibility is it to conduct screening and background checks?
  - What training will adults and students receive so they can perform their roles effectively? Who will devise and provide that training?
  - Do you want relationships between students and adults limited to this endeavor or are you trying to build longer-lasting relationships? How will this affect how you structure adult and student roles and interactions?

## **The Partnership Agreement**

Negotiating your partnership agreement is a very important step. Consider the points below as you launch your SaYES collaboration.

### **Ten Points for Successful Partnership Negotiations:**

1. Honor the relationship.
2. Create a negotiation environment that encourages innovation.
3. Be realistic and fair.
4. Recognize that each partner and partnership is unique.
5. Engage in active listening.
6. Know your bottom line.
7. Know the difference between "positions" and "interests."
8. Come prepared to commit resources.
9. Take a fresh look at practices and standards.
10. Allow sufficient time for partners to work out details.

A more detailed version of the *Ten Points for Successful Partnering Negotiations* is available in Appendix B.

## **The Memorandum of Understanding**

A Memorandum of Understanding, known as an MOU, is a standard document used to cement an understanding between partnering agencies. Not all SaYES partnerships will require an MOU, but if you decide you need one, consider including:

- Names and addresses of the parties involved (partnering institutions)
- Description of the institution types (examples: educational nonprofit; school or district; nonprofit agency; for-profit business)
- Purpose for partnering
- Scope of work
- Activities that are covered
- Responsibilities of the parties
- Resource commitments if applicable
- Contact person for each party
- Period of agreement
- Special conditions (examples: ownership of materials produced; constraints due to involvement of minors; specific agency conditions)
- Signatory line, including space for name, title, date (to be signed by an executive representing each party)

Although the MOU is not as formal as a contract, it can have legal implications should any disagreements arise during your collaboration. Please make sure you follow your agency's policies about making an agreement with an outside party.

### **Tips for Creating an MOU**

Appendix B includes an MOU Worksheet to gather the information you'll need, as well as a sample MOU.

## **Now You're Ready—Together!**

Having accomplished the preliminaries that contribute to effective partnering, you're now at the point where you and your partner can dig in and start the SaYES effort you're *both* envisioning.

### III. Engaging Older Adult Volunteers To Support Service-Learning Efforts: Strategies For Schools

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#### Introduction

This part of the SaYES guide is for school- and community-based Learn and Serve coordinators, teachers, and others interested in engaging RSVP and other volunteers ages 55+ to support youth in service-learning projects.



As a service-learning practitioner, you understand the importance of integrating meaningful service, instruction, and reflection to enrich student learning and build stronger community connections.

If you currently implement a high-quality service-learning curriculum and have the support of your school and/or district, you might consider engaging volunteers to enhance your project(s).

One potential source of volunteers is the group age 55+. You already have expertise in service-learning. But, what about engaging older volunteers?

- How can they enhance your service-learning program?
- What roles can they play?
- What agencies can you partner with to access these volunteers?

This section of the course will help you answer these questions and create an action plan for engaging volunteers in your service-learning project.

#### Boomers...Who are They?

Older adult volunteers have long served in schools as mentors, tutors, and general helpers. As you think about involving older adult volunteers to support service-learning, consider the skills and talents of a particular segment of the older adult volunteer population garnering particular attention of late: Baby Boomers.

Demographers tell us that Boomers—Americans born between 1946 and 1964—bring a diverse array of skills as well as the energy and motivation to tackle social issues and other community problems and the desire to make a difference, while also meeting their own needs for fulfillment. Many Boomers want to put the knowledge and expertise they gained during years of employment to use in new ways.

In 2005, nearly one-third of Boomers volunteered, according to an annual Bureau of Labor Statistics survey released in December 2005. They gave a median of 51 hours a year, or about one hour a week, making them the most active volunteers, after people older than 65.

Research also indicates that Baby Boomers want choice and flexibility in volunteer assignments. To provide that choice and flexibility think about the range of ways a volunteer age 55+ might be able to assist your service-learning project. These can include:

- Coordinating logistics of service-learning projects
- Needs and asset mapping
- Sharing specific content knowledge or skills with teachers and students
- Establishing and maintaining community-school relations
- Facilitating student reflection and/or discussions on community involvement/civic engagement
- Performing program administrative duties
- Preparing students for service
- Resource mapping
- Engaging youth in developing service-learning projects
- Evaluating service-learning projects and partnerships
- Assisting teachers and other staff with integrating service-learning in disaster preparation, response, relief, and rebuilding efforts that engage youth

### **Why Engage Boomers in My Service-Learning Project?**

Enlisting volunteers to enhance your service-learning project can bring many benefits. In general, volunteers age 55+:

- Are reliable. They tend to arrive promptly and notify staff if they won't be there.
- Are ideal school volunteers if they are retired or have cut back on employment, because they have time available during the day.
- Are interested in making long-term commitments to the youth and the program, and may continue volunteering for years.
- Tell their friends about their volunteer experience and recruit others to join them.
- Are patient and caring and enjoy working with youth.

## Is My Service-Learning Project Ready To Engage Volunteers Effectively?

Incorporating the talents and skills of volunteers age 55+ into your project takes careful planning and volunteers require ongoing support. To assess your service-learning program's readiness for engaging volunteers, take a look at the bulleted list of effective service-learning elements below. How many elements do you have in place?

### Effective Service-Learning:

- Provides an opportunity for students and others to respond to real needs and assets in the community, as identified by all stakeholders in the service-learning partnership. The scale can range from local to global.
- Extends learning from the classroom into the community and allows students to use skills and knowledge in real-life situations.
- Links explicitly to academic curriculum and content-area standards.
- Offers opportunities for reflection on service and facilitates exploration of the importance of and opportunities for engagement in citizenship and service to community as a lifelong value.
- Devotes careful attention to planning and to interaction with collaborators so that all partners (including community members) work together successfully to meet their goals and needs.
- Develops relationships over time as a result of the service-learning experience.

If you have all of the elements in place, you are ready to engage volunteers. If one or more of these elements is not in place, your program can still benefit from the contributions of volunteers.

To think about ways to strengthen your program, visit the Resources index ([http://servicelearning.org/resources/a-z\\_topics/index.php](http://servicelearning.org/resources/a-z_topics/index.php)) of the National Service-Learning Clearinghouse and click on the topics you want to learn more about.

## Creating an Action Plan

Engaging volunteers in your service-learning project takes careful planning. Before looking for volunteers, think through your project and identify your resources and needs.

See Appendix C for a worksheet to help you create an action plan for engaging older adult volunteers. Use the *Action Plan Worksheet for Schools* to think through all the considerations of planning for, engaging, and supporting age 55+ volunteer involvement in your service-learning project!

## Developing a Position Description

A strong, clear position description can help you find the right volunteer for your project. As you begin to think about the role(s) volunteers might play in your service-learning project, ask yourself the following questions:

1. What qualities should the volunteer bring? (See *Service-Learning Volunteer Inventory* in Appendix C)
2. What do I need from the volunteer in terms of specific duties, attendance, reporting, and time commitment?
3. How much flexibility can I build into the volunteer assignment?
4. What kinds of fingerprinting and background checks need to be conducted? How are those paid for?
5. Are there other risk management issues, such as insurance?
6. Where will the volunteer work?
7. What kind of training will the volunteer need?
8. Who will supervise the volunteer?
9. How will the volunteer's contributions be appreciated and celebrated?

Next, consider the goals of your project, the strengths and needs of the population you serve, and the activities in which the volunteers may be engaged. Be aware of the physical and time demands of your program.

Use the *Volunteer Position Description Worksheet* (see Appendix C) to begin creating your position description. You can also view some sample position descriptions in Appendix C.

## Finding Volunteers

There are a range of potential volunteer sources in every community. Here is a list to get you started.

### **RSVP** (<http://seniorcorps.gov/about/programs/rsvp.asp>)

RSVP, one of Senior Corps' three programs, engages adults 55 and older in meaningful volunteer service. RSVP matches the personal interests and skills of volunteers with existing opportunities. If there is an RSVP project in your community, it's a natural source of prospective volunteers for your service-learning project.

### **The Volunteer Center National Network** ([www.pointsoflight.org/centers/](http://www.pointsoflight.org/centers/))

The Points of Light Foundation works in partnership with the Volunteer Center National Network (VCNN) to help mobilize people and resources to find creative solutions to community problems. Volunteer centers are key local resources for volunteer involvement.

**Hands On Network** ([www.handsonnetwork.org](http://www.handsonnetwork.org))

Hands On Network brings people together to strengthen communities through meaningful volunteer action. The Web site provides connections to volunteer opportunities as well as links to national and international member organizations.

**Experience Corps** ([www.experiencecorps.org/](http://www.experiencecorps.org/))

Experience Corps offers service opportunities for Americans over 55. Visit their Web site to see if Experience Corps exists in your area.

**Generations United** ([www.gu.org/](http://www.gu.org/))

Generations United (GU) is a national membership organization focused solely on improving the lives of children, youth, and older people through intergenerational strategies, programs, and public policies. Search the database of existing programs ([www.gu.org/progr5161177.asp](http://www.gu.org/progr5161177.asp)) by location and/or focus area to find appropriate partnering opportunities near you.

**Volunteer Resource Tips**

- Go to the [RSVP](http://www.seniorcorps.gov/about/programs/rsvp.asp) Web site ([www.seniorcorps.gov/about/programs/rsvp.asp](http://www.seniorcorps.gov/about/programs/rsvp.asp)) and, at the bottom of the page, select your state to find local RSVP programs to contact.
- Go to the Points of Light Foundation website (<http://www.pointsoflight.org/centers/>) to find a volunteer center in your state and region. In the left-hand column of this website, select "Directory of Centers." You will be taken to a U.S. map and a list of all the states. Once you click on your state you will see a list of volunteer centers and information about each. From this point you can begin to call possible volunteer sources.

**More Recruiting Information**

If you want help directly recruiting Baby Boomer volunteers to support your project, contact the Temple University Center for Intergenerational Learning, the Corporation's Training and Technical Assistance Provider for Engaging Baby Boomers ([www.nationalserviceresources.org/resources/tta/index.php#temple\\_university](http://www.nationalserviceresources.org/resources/tta/index.php#temple_university)).

**Recruiting Volunteers Directly**

In addition to national sources of volunteers age 55+, many local agencies might serve as rich sources for prospective recruits. See below for options that may exist in your community.

- **Civic or neighborhood associations.** These groups often focus on particular street blocks or neighborhoods. Some associations focus on civic involvement of particular cultural groups, such as the Japanese American Citizens League.
- **Grassroots services and organizing groups.** These organizations often focus on issues unique to a particular community in the areas of housing, healthcare, artistic and cultural programming, childcare, social action, and advocacy. Look for groups with a focus that corresponds to your service-learning project needs.
- **Faith communities.** Churches, mosques, synagogues, and other places of worship are a tremendous source for locating prospective volunteers. Provide a newsletter article or a poster to put on their community bulletin board. Ask if there is a group that you could talk with personally.
- **Service-learning provider organizations.** These organizations help educators and students design high-quality service-learning projects. They often have existing relationships with schools and connections to local colleges and universities. To find local, regional, and national service learning provider organizations, visit the National Service-Learning Partnership at [www.servicelearningpartnership.org](http://www.servicelearningpartnership.org).
- **Social service clearinghouses and volunteer mobilizing groups.** Well-known, large, civic institutions, such as the League of Women Voters, Girl Scouts of America, and United Way, can be a powerful resource to potentially tap into hundreds of volunteers to support a cause. Contact local branches to explore possibilities. Also, consider your local Hands On Network, if one exists in your community. For more information visit: [www.handsonnetwork.org](http://www.handsonnetwork.org).
- **Education institutions.** School, district, and state K-12 retired teacher and teacher union organizations can often provide connections to volunteer resources. Colleges and universities can also be contacted for retired alumni volunteers and retired professors or instructors who also might want to volunteer in schools. Specifically, contact University Colleges of Education, alumni offices, and faculty retirement offices. K-12 or higher education service-learning offices might be able to direct you to retired service-learning faculty, as well.
- **Local businesses.** If there are major companies in your community, talk with their human resources department to learn if they have retirement planning meetings for their older staff. If so, ask if you could provide information about your volunteer needs. Many older adults like to start their volunteering pre-retirement. In addition, many businesses increasingly provide paid release time so that employees can volunteer in their communities. Consider local Chambers of Commerce, including the African-American Chamber, Women's Chambers, and others that exist in your community.

- **Other public and nonprofit institutions.** Museums, zoos, libraries, nonprofit theaters, ballet and opera companies, park and recreation commissions, hospitals, courthouses, correctional facilities, government offices and agencies, and other institutions are great sources of potential volunteers and can be additional resources for service-learning project opportunities.

Once you have done some research, begin to list potential sources of volunteers in your community. Use this list to begin making those important first phone calls. As you call, make note of how promising that agency seems for what you want. If you haven't already done so, read the ***Effective Partnering*** section of this guide for additional information about partnering effectively with volunteer agencies.

### **Tips for Working Effectively with Volunteers Age 55+**

1. Look for and capitalize on the existing skills and experience of your volunteer. (If your volunteer filled out a *Service-Learning Volunteer Inventory*, refer back to it for more information.)
2. Create opportunities for the volunteer to use specialized knowledge and skills. Make sure the duties and responsibilities you require match those outlined in the service description. All volunteers are sometimes required to help in unexpected ways, but remember that this volunteer responded to your opportunity because of a particular interest in the role described.
3. Provide an orientation to the school and to the service-learning program.
4. Understand and communicate how the work of the volunteer fits into the overall context of your service-learning project. Provide an overview of the project and of the desired outcomes for youth involved.
5. Communicate often with your volunteer, and attend to any feedback about the volunteer experience.

Remember that many of today's adults ages 55+—whether by choice or necessity—have rejected the traditional idea of retirement. Offer prospective volunteers a sense of control of their own time while still allowing them to serve their communities.

## For More Information

### Eight Tips for Recruiting and Working With Baby Boomer Volunteers

By Joanne Fritz, Ph.D.

All eyes seem to be turning to the baby boomers as potential volunteers. In December, 2005, the "Get Involved" campaign was revealed at the White House Conference On Aging by the Corporation for National and Community Service. Recognizing the extraordinary volunteer power among America's 77 million baby boomers, CNCS has developed a multi-year public service ad campaign asking baby boomers to get involved with their communities. Why the sudden interest? In 2006 baby boomers started turning 60 years old. The entire generation (1946-1964) is now between the ages of 42 and 60, which includes some of the prime ages for volunteering. According to the Bureau of Labor Statistics, 33.2% of all boomers (25.8 million people) volunteered for formal organizations in 2005, representing the highest rate of volunteering of any age group (and standing more than four percentage points above the national average of 29%). Baby Boomers do present some challenges to volunteer managers, however. Here are our top tips for turning them into your best volunteers and supporters.

**1. Respect Their Schedules** Boomers are time-stretched. They are likely to still be working; they often are looking after children as well as helping out aging parents; and they love to travel and have many hobbies. Give them flexible opportunities that include short-term timelines with clear start and finish dates. Consider family volunteer opportunities so that volunteers do not have to choose between volunteering and being with their families. Older boomers will enjoy volunteering alongside their grandchildren.

**2. Treat Them as Colleagues** Don't be alarmed when your boomer volunteers resist authority, talk back, or question how things are being done. The ultimate anti-authoritarians, baby boomers do not like to be told what to do. Ask them; don't tell them. Make every step of the volunteer process a participatory one. Take advantage of their intelligence, experience, and education.

**3. Develop Opportunities That Really Matter** Offer meaningful and challenging volunteer opportunities. Boomers are knowledgeable about social issues, may have strong opinions, and may be experienced social activists. Develop volunteer opportunities that take advantage of their passions and their know-how. Involve them in decision making and goal setting. No envelope stuffing please.

**4. Remember That Volunteering Is Optional** Remember that boomers don't have to volunteer. Their parents may have volunteered because it was what was expected, but boomers are the ultimate consumers and see volunteering as a way to get their own needs met as well as providing service to others. Let them tell you what they need; they won't be shy. They may be looking for recognition, friendship, the opportunity to be creative, to be in charge of something, to relax, to learn new skills, or set an example for their grandchildren.

**5. Make Sure You Are Organized and Professional** Baby boomers will not tolerate disorganization, or sloppiness of any kind. They have been working all of their lives, often in responsible positions, so they know what works and what doesn't in organizations. Be clear, be organized, and don't make your boomer volunteers root around for answers to their questions. Assign someone on your staff to be point person. Boomers will not like it if they get a different person every time they call or ask for assistance.

**6. Train With Relevance** Provide training that is relevant, meaningful, and well-presented. This generation is already highly credentialed and is not looking for more certifications. They want education that will help them develop their full potential, not training that is all about regulations and control. Use adult learning models. Treat volunteers as colleagues, not students. Use discussion, not lectures. Make lessons experiential, not book-based.

**7. Reach Boomers through Their Peers** Appeal to baby boomers through their peers. They are much more likely to respond to messages from their peers than celebrities or authority figures. Recruitment materials should focus on other boomer volunteers with lots of stories and testimonials. You could even employ nostalgia for the older boomers. Take a look at some of the advertising from financial companies that are targeting boomers--especially Ameriprise and Fidelity.

**8. Recruit Boomers at Work** Since most boomers are still working, try recruiting them at the office. Many employers have programs for their workers, allowing them to use company time to volunteer for select organizations. Work with these companies and their volunteer coordinators. The baby boom generation really is the "pig in the python" and it is moving across your line of sight, right now. Baby boomers are 77 million strong, and represent huge potential as volunteers. Don't get left behind. Learn about baby boomer needs and start converting your volunteer environment to one that will appeal to this huge and lively generation.

**Note:** The "Get Involved" campaign is being launched in partnership with America's nonprofit community. Thirty-four organizations, including AARP, the American Red Cross, America's Promise, Big Brothers Big Sisters of America, Habitat for Humanity, Catholic Charities, and Communities in Schools, have signed on as campaign supporters. You can sign on too at <http://www.getinvolved.gov>.

*Dr. Joanne Fritz is founder and publisher of [www.second50years.com](http://www.second50years.com). She has experience as a teacher in settings from a public high school to universities and more than 20 years as an administrator in Girl Scouts of the USA and Elderhostel. Dr. Fritz is the expert guide at [www.About.com](http://www.About.com) for content about nonprofit organizations. (Article reprinted with permission from [www.second50years.com](http://www.second50years.com).)*

## Providing Initial and Ongoing Training and Support for Volunteers Age 55+

Volunteers need quality initial and ongoing training to be successful. Training may or may not be provided by the volunteer-providing agency. If you and the volunteer agency completed a *Memorandum of Understanding (MOU)*, you likely outlined the responsibilities of each partner in regard to training. (NOTE: See Appendix B for a sample MOU.)

Even if the volunteer agency is responsible for some training, as the service-learning leader, you will be providing additional supervision and training support.



## **Adapt Your Training to Baby Boomers**

Tailor your training approach to the Boomer generation. Researchers have developed a set of principles to help trainers working with adult learners:

- **Tap volunteers' previous experience and skills.** Volunteers age 55+ have many years of experience that are a foundation for learning new skills. Inquire about experiences and use them in training sessions.
- **Involve volunteers in planning and implementing training activities.** Involving adults in their training is a hallmark of adult education. What do your volunteers say they need to learn? Including Boomer volunteers in the design of SaYES volunteer training shows respect for them and the life experiences they bring. Consider a peer-exchange training approach.
- **Increase motivation by explaining rationale.** Adult learners are more motivated to learn when they know why specific things are in the curriculum.
- **Create a climate that supports learning.** Some volunteers may be reluctant to enter new situations or an education environment. Some may believe they're too old to learn new things. A welcoming and comfortable training environment supports learning.
- **Encourage self-directed learning.** Self-directed learning, rather than teacher-directed instruction, cultivates confidence, awareness, and empowerment in adult learners.
- **Train in small groups.** Breaking into smaller groups encourages discussion, sharing experiences, and peer learning. Small-group learning also encourages the collaboration and teamwork you may desire among SaYES volunteers.  
*Source: Inspiring Volunteer Development: A resource book for training senior volunteers in intergenerational programs.*

## **IV. Finding and Keeping the Right Volunteers Age 55+: Strategies for Volunteer Organizations**

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### **Introduction**

This chapter is for staff of RSVP projects and other non-profit or community-based organizations that recruit, place, and support older adult volunteers. It focuses on cultivating Baby Boomers as volunteers to support service-learning. What should you know about Baby Boomers specifically to engage this new, mature adult generation as volunteers for SaYES service-learning projects? Read on to find out.

### **Finding and Attracting Baby Boomers**

The Boomer generation is large, over one quarter (27.5 per cent) of the U.S. population—76 million Americans born from 1946–1964. The first Boomers are reaching their 60s now and many have increasing time to volunteer in their communities. Older adults have long served in classrooms and school-based programs as tutors, mentors, and general helpers. Boomers are a growing resource with the capacity to fill more diverse and active volunteer roles in service-learning.

### **Boomers...Who they are and why it Matters**

Events and cultural phenomena that marked the youthful years of Baby Boomers' lives have influenced their general values and mindsets, regardless of how they reacted to them. Some key influences on the Baby Boomer generation include:

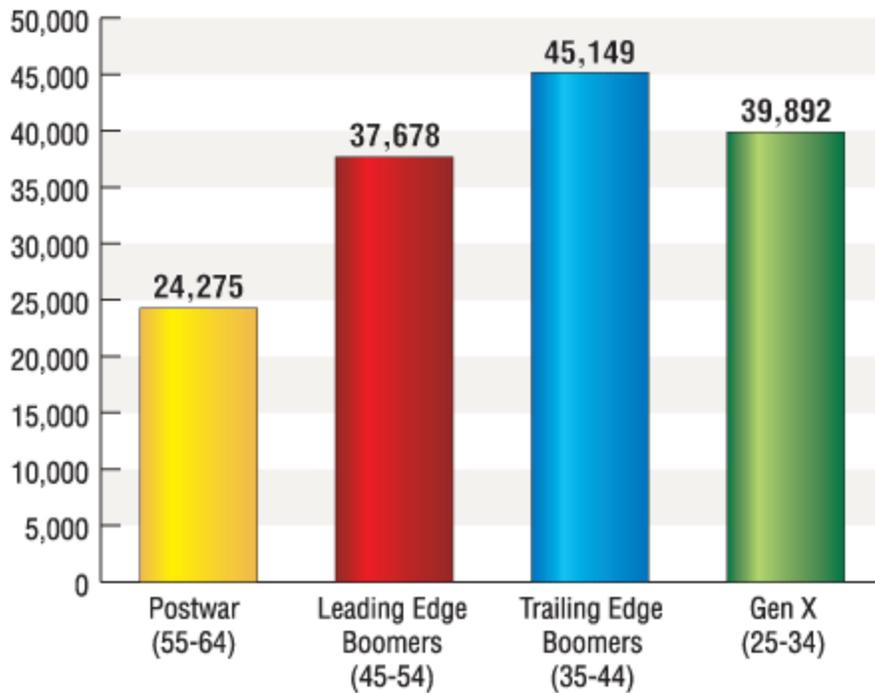
- Vietnam War
- Economic abundance for some
- Civil Rights/Black Power and Chicano movements
- Women's Liberation movement
- Gay and Lesbian movement
- School desegregation and busing
- Space travel
- Rock music
- Hippie culture (long hair, psychedelic drugs, sexual freedom)
- Assassinations of key leaders (John F. Kennedy; Martin Luther King; Jr., Robert Kennedy)
- Invention of TV and computer

Recognizing what's shaped Boomers' life experiences and how they perceive themselves is an important matter if they are the adults you'd like to recruit.

The following chart represents the relative sizes of Boomer cohorts in relation to each other and the Postwar and Gen X cohorts.

## Relative Cohort Sizes, 2000

in millions



Source: *After Fifty: How the baby boom will redefine the mature market*

### For More Information

See these additional resources in the Appendix:

- *Boomer Cohorts and Formative Experiences* (Appendix A)
- *Quick Facts About Baby Boomers* (Appendix A)
- *Boomer Differences: One Size Does Not Fit All* (Appendix A)

## **What Boomers Want**

Research has identified four major needs and desires among aging Americans that cut across income, education level, and race/ethnicity. Mature adults are seeking:

- Opportunities to explore options for the next life stage
- New skills and training to pursue educational interests
- Flexible opportunities for work or service that use their skills and experience in meaningful ways
- Meaningful connections with others their own age and throughout their communities

Accessing service-learning volunteer opportunities with Boomer needs and desires in mind is a way to draw Boomers and harness their energy. Through volunteering in service-learning Boomers may:

- Explore ways to structure their time
- Gain new knowledge and skills, either for pleasure or job aspirations
- Become more connected to their neighborhood or local community
- Share knowledge and skills with others
- Develop rewarding relationships with young people and other adults

## For More Information

For insights about what Boomers want in their next life stage and about how sectors of our culture can plan, both to assist this generation and to take advantage of the “experience dividend” that Boomers can offer, see:

- *Blueprint for the Next Chapter*. Download a copy at:  
[www.civicventures.org/publications/booklets/blueprint.pdf](http://www.civicventures.org/publications/booklets/blueprint.pdf)

To find out more about volunteer opportunities Boomers generally respond positively to, see these resources:

- *Understanding the Motivations of Baby Boomer Volunteers*. Access this document at:  
[http://nationalservicerresources.org/epicenter/practices/index.php?ep\\_action=view&web\\_id=33560](http://nationalservicerresources.org/epicenter/practices/index.php?ep_action=view&web_id=33560))
- *Ask the expert: Andrea S. Taylor, Ph.D., Temple University, Center for Intergenerational Learning*. Access these tips at:  
[http://nationalservicerresources.org/resources/online\\_pubs/boomers/expert.php?search\\_term=intergenerational](http://nationalservicerresources.org/resources/online_pubs/boomers/expert.php?search_term=intergenerational)

Volunteer needs are valid. Acknowledge those needs when recruiting and placing volunteers, and when thinking about how to retain quality volunteers. Here’s a resource that will help you examine how well your program is doing in relation to basic volunteer needs:

- *Using volunteer retention principles to examine program strengths and challenges*. Access this document at:  
[http://nationalservicerresources.org/epicenter/practices/index.php?ep\\_action=view&ep\\_id=938](http://nationalservicerresources.org/epicenter/practices/index.php?ep_action=view&ep_id=938))

## A Changing View of Volunteering

The volunteer arena is changing to suit the differences in values and needs between the World War II generation and Boomers. How can you shape your SaYES volunteer opportunities to fit the new paradigm and be attractive to Boomer generation volunteers while you also support service-learning? Take a look at the *Changing Volunteer Paradigm* chart that follows to consider some of these differences.



### The Changing Volunteer Paradigm

	<b>Old Paradigm</b>	<b>New Paradigm</b>
<b>Volunteer Motivation</b>	Civic duty	Improve the world and find personal fulfillment
<b>Volunteering Pattern</b>	Long term, regular	More short term, sporadic
<b>Volunteer Autonomy</b>	Limited: Volunteers receive preset guidelines, procedures	Increased: Volunteers active in developing their opportunities, in decision making
<b>Volunteer Expectations of Reward</b>	Low: Seek mostly recognition, appreciation; some expense reimbursement	Higher: Seek recognition, appreciation; expense reimbursement; possibly cash-equivalent incentives (tickets, class fee waivers)
<b>Volunteer Relationship to Organization</b>	Strong identification: Conforming, loyal	Loose identification: More individualistic, critical; may “walk” if unsatisfied
<b>Volunteer Manager View of Volunteer</b>	Subordinate: Volunteer provides a service	Partner: Volunteer goals for work, self a consideration
<b>Volunteer Manager Management Style</b>	Command and control; top-down; volunteer manager as expert, boss	More participatory; collaborative: volunteers have input, influence decisions; volunteer manager is “team leader”
<b>Interviewing/Placement Process</b>	Priority is organization/project needs; limited knowledge about volunteer; some skill assessment	Balance between organization and volunteer needs; assessment process more thorough—focus on “whole volunteer,” not just skills
<b>Volunteer Opportunities Offered</b>	Limited choice; mostly long-term and unskilled	Wider choice; greater diversity in tasks, time commitment, skill levels/types

Source: Temple University Center for Intergenerational Learning

### For More Information

This article is a good avenue to the topic of volunteer arena restructuring and can help you plan opportunities adjusted to Baby Boomers:

- *Volunteer Management Review*. Access this online journal at <http://charitychannel.com/publish/templates/default.aspx?a=7284&template=print-article.htm>)

## Developing Compelling Volunteer Opportunities for Boomers

### Boomer Volunteer Possibilities

Baby Boomer volunteers can offer support to academic and service-learning goals in a range of capacities. Below are some of the many ways Boomer volunteers can support service-learning:

- Work on school/youth program relations with the larger community
- Assist teachers/youth leaders in integrating service-learning into the school curriculum or youth program
- Help students reflect on their service
- Coordinate logistics
- Assist in developing service content
- Assist with program administrative duties

Explore the ways Boomer volunteers can support youth engaged in service-learning by taking a look at the age 55+ volunteer service descriptions in Appendix C.

**Tip:** Offer variety in frequency and intensity of service. Your recruitment efforts will be more fruitful if you provide opportunities along the continuum from limited time commitments to sustained or intensive volunteer service. The *Spectrum of Volunteer Service Options* chart below shows that a range of volunteering roles and levels of commitment may be designed to support service-learning and volunteers' needs.

## Spectrum of Volunteer Service Options

Volunteer Options	Episodic Volunteering	Ongoing Formal Volunteering	Sustained or Intensive Volunteer Service
<b>Commitment</b>	One-time or occasional commitment	Regular, repeating commitment; may be once/week or several for academic year or service-learning duration	Ongoing or substantial time commitment to a service-learning program or project
<b>Example</b>	Sharing knowledge with students about a specific topic about which volunteer has expertise	Accompanying students biweekly over the academic year to stream site to record data for county watershed study	Serving as volunteer liaison between the teacher or school and a community partner; helping teachers design reflection activities

*Adapted from: Blueprint for The Next Chapter.*

### Writing Strong Service-Learning Volunteer Descriptions

Creating strong volunteer descriptions helps volunteers:

- Focus their talents toward program or project goals
- Determine if their interests, qualifications, and schedule are a good match
- Know what is expected from them in a specific service-learning situation

What's important to include in a service-learning volunteer description?

- A description of the volunteer opportunity
- Volunteer title, role, and expectations
- Accurate date/time/duration of service
- Benefits to the volunteer, both abstract and concrete
- Any stipends or reimbursements offered
- Up-to-date contact information

View examples of service-learning volunteer position descriptions in Appendix C. Duplicate and use the *Volunteer Position Description Worksheet* (also in Appendix C) as a guide to begin drafting your own position descriptions.

## Developing Marketing Messages to Attract Boomers

What are you selling? Communicate clearly that service-learning is more than student volunteering. Sometimes, at first glance, this educational approach that combines learning with service is hard to understand. Potential volunteers need some knowledge of service-learning to be most helpful.

Include a short description of service-learning with volunteer position descriptions. A brief description of the specific project can also be helpful.

Remember, service-learning:

- Is a teaching and learning strategy that integrates meaningful community service with academic study.
- Combines service objectives with learning objectives.
- Is structured; reflection time enriches and informs the service-learning experience.
- Allows youth and community stakeholders to have a voice in and impact on the process.
- Shares results and recognizes or celebrates work well done to motivate students and other participants to continued learning and community involvement.

### For More Information

Two accessible resources that can help you craft messages about service-learning include:

- *Talking Smart About Service-Learning: A Checklist*. Download this tool at: [www.service-learningpartnership.org/site/DocServer/Talking\\_Smart\\_About\\_SL2.pdf?docID=2102](http://www.service-learningpartnership.org/site/DocServer/Talking_Smart_About_SL2.pdf?docID=2102))
- *Talking Smart About Service-Learning: What We've Learned*. Download this tool at: [www.service-learningpartnership.org/site/DocServer/Talking\\_Smart\\_About\\_SL\\_2.pdf?docID=2101](http://www.service-learningpartnership.org/site/DocServer/Talking_Smart_About_SL_2.pdf?docID=2101))

## **The Creative Brief: Develop a Marketing Message That Attracts Boomers**

Temple University's Center for Intergenerational Learning, in consultation with marketing professionals, has developed a creative brief process that can help volunteer organizations arrive at their own marketing message to attract Baby Boomer volunteers.

What's a creative brief? A creative brief is a document used in the marketing and advertising professions that summarizes your research and goals in a clear, crisp format so that your message can be developed and communicated succinctly, precisely, and clearly.

Every creative brief should provide:

- The target audience you wish to reach
- The present relationship that the target audience has to your service/product
- How you would like the relationship to change with the target audience as a result of your communications
- A statement of what you can say to make the desired change happen; marketing slogans or taglines distill your insight

You may also use the *Creative Brief Worksheet* (see Appendix D) for a more detailed look at the creative brief process that will enable you to develop marketing messages aimed at Baby Boomers and suited to your project.

### **Marketing to Boomers**

Personal contact and word-of-mouth are very effective means of recruiting volunteers. People respond to people. Once you have recruited volunteers from Baby Boomer ranks, your most powerful recruitment tool will be satisfied volunteers who tell others and encourage them to join in.

At the outset, however, a broader media mix will be needed.

Listed below are some common media and message delivery options that you can adapt to your particular SaYES partnership. Think about the motivational "hook" for each example. Is this a hook that could be adapted for your recruitment appeal? What would your message say?

To see examples of marketing materials, visit the online course, *Making the Connection* at SaYES: Seniors and Youth Engaged in Service ([www.servicelearning.org/resources/sayes/index.php](http://www.servicelearning.org/resources/sayes/index.php)).

- **Personal Contact/Relationship Marketing:** Personal networking, presentations, orientation sessions, phone calls. (Consult the Experience Corps publication, *Appealing to Experience*, which you can retrieve from: [http://experiencecorps.org/images/pdf/EC\\_tlkt\\_final.pdf](http://experiencecorps.org/images/pdf/EC_tlkt_final.pdf))

- **Promotional Materials/Environment:** Brochures, flyers, CDs, videos, program newsletters, letterhead, business cards, events/info tables, website, office signage, T-shirts, uniforms, bumper stickers, pins, magnets, annual report, office presence
- **Public Relations:** Press releases, media interviews, editorial/letter to editor, public service announcement (PSA,) backgrounder, fact sheet, radio talk show
- **Advertising:** Newspapers, newsletters, magazines, billboards, transit ads, Internet, broadcast Fax, telemarketing, email ads, and direct mail, such as the SaYES postcard below, designed for recruiting campaigns

See the article *Ten Ways to Retire “Retirement”* in Appendix D for more ideas on appealing effectively to prospective Boomer volunteers.

### **A Personalized Postcard Recruitment Tool**

Personal connections are a very effective way to recruit new volunteers. Invite current volunteers to send custom, SaYES postcards to age 55+ friends and acquaintances who have the talents and background to be SaYES volunteers. Senders can add their name to the card to give the appeal a more personal touch. On the next page you will find the front and back of a recruitment postcard. (A ready-to-duplicate version of this SaYES recruitment postcard is available in Appendix D.)



# Picture yourself making a difference

Help students learn and serve  
SaYES . . . Volunteer!

SaYES Recruitment Campaign  
Seeking adult volunteers age 55+

You have received this postcard because someone believes that you'd make a great SaYES volunteer. The SaYES project involves volunteers age 55+ and young people in a community service project that is also a learning experience for the students.

To find out more about the SaYES program, please fill in the information below and return the card to the agency address listed to the right. If you're not interested, please pass this card along to someone you know who might wish to become a SaYES volunteer.

Thanks!

- Yes! I am interested in SaYES volunteering.*
- I would like to learn more about SaYES.*

Your name: \_\_\_\_\_

Daytime phone #: \_\_\_\_\_

Home address: \_\_\_\_\_

**SaYES**  
Seniors and Youth Engaged In Service

postage  
here

Mail to:

## **Where are Baby Boomers?**

Make a list of places Boomers gather in your community. Many community gathering spots provide bulletin boards for informational exchange. Most organizations and businesses have Web sites that draw regular visitors.

Use the following list of *Questions and Suggestions to Help Focus Your Boomer Recruitment Efforts* to help you generate ideas about where to appeal to potential Boomer volunteers.

**Where do Boomers reside?** At this time, most Baby Boomers live in independent residential settings. Boomers are physically able and have not moved to senior-living environments. Boomers' homes are as wide-ranging in type and location as the general population. Neighborhoods develop over time, so there will be some areas of town or residential developments that will be home to more Boomer-generation residents than younger families or young singles.

**Where do Boomers attend events or meetings?** Target special interest groups, such as the local Audubon Society chapter if you're doing an environmentally-focused project or an artists' cooperative if your project involves a community mural. Professional organizations and neighborhood associations are other groups that meet regularly.

**Where are Boomers employed?** More and more businesses organize employee volunteer groups that allow staff to take personal leave or use work time for community service. Some businesses even adopt a specific community cause. If you need help figuring out the best approach to the business community, contact your local chamber of commerce for more information about avenues for reaching potential business partners who may have these types of programs.

**Where do Boomers find recreation?** Here are just a few places where you might find Boomers involved in recreational activities: Municipal recreation centers; fitness clubs; golf courses; and regional recreational facilities. Beyond sports and outdoor activities, Boomers may frequent local libraries or bookstores.

**Where do Boomers gather for social events?** There may be a main street coffee shop, a community theater, or an arts center that functions as a community hub for some Boomers. Local historical societies are good place to locate mature adults who are interested in their communities and may be veteran volunteers. Annual community festivals and fairs are another venue for locating active Boomers. Contact event organizers to solicit suggestions for how to best reach out to Boomers through these venues.

Adapted from *Collaborating with Schools: A Guide for Community-Based Organizations* by Karen Dischler and Bonnie Schmidt

## Topics To Consider for Service-Learning Volunteer Orientation and Training

Volunteers need initial and ongoing training to be effective. RSVP directors may provide some pre-service orientation about the volunteer placement site, but in most cases schools will train volunteers onsite. Other volunteer programs will have different requirements around training. When appropriate, work with the service-learning coordinator or other staff at the placement site to ensure that volunteers receive adequate training and support.

Pre-service orientation topics may include:

- Program introduction
- Reporting requirements
- Introduction to service-learning
- School policies and procedures
- School culture
- Principles of youth development
- Community outreach

Ongoing training topics may include:

- Working effectively in teams
- Connecting to the school curriculum
- Communication skills
- Cultural sensitivity
- Multiple learning styles

### Adapt Your Training for Baby Boomers

Tailor your training approach to the Boomer generation. Researchers have developed a set of principles to help trainers working with adult learners (Crocoll, 2001):

- **Tap the volunteers' previous experience and skills.** Volunteers have many years of experience that are a foundation for learning new skills. Inquire about experiences and use them in training sessions.
- **Involve volunteers in planning and implementing training activities.** What do your volunteers say they need to learn? Including Boomer volunteers in the design of SaYES volunteer training shows respect for them and the life experiences they bring. Consider a peer-exchange training approach.
- **Increase motivation by explaining rationale.** Adult learners are more motivated to learn when they know why specific things are in the curriculum.

- **Create a climate that supports learning.** Some adults may be reluctant to enter new situations or an education environment. Some may believe they're too old to learn new things. A welcoming and comfortable training environment supports learning.
- **Encourage self-directed learning.** Self-directed learning, rather than teacher-directed instruction, cultivates confidence, awareness, and empowerment in adult learners.
- **Train in small groups.** Breaking into smaller groups encourages discussion, sharing experiences, and peer learning. Small-group learning also encourages the collaboration and teamwork you may desire among SaYES volunteers.

### **For More Information**

#### **Resources for Preparing and Supporting Boomer Volunteers**

The Corporation for National and Community Service offers many training and technical assistance resources to support programs enlisting volunteers. Here are some online resources to assist you with volunteer training and support:

- The Corporation's Resource Center Web site has an entire section of online publications devoted to training ([http://nationalservicerresources.org/resources/online\\_pubs/index.php#training](http://nationalservicerresources.org/resources/online_pubs/index.php#training).)
- The National Service-Learning Clearinghouse provides many resources ([www.servicelearning.org/resources/](http://www.servicelearning.org/resources/).)
- Temple University's Center for Intergenerational Learning provides training and technical assistance on meeting Boomer needs effectively ([www.nationalservicerresources.org/resources/tta/index.php#temple\\_university](http://www.nationalservicerresources.org/resources/tta/index.php#temple_university))
- LEARNS offers training and technical assistance to programs focused on youth and education ([www.nationalservice.org/resources/sites/learns](http://www.nationalservice.org/resources/sites/learns))

### **Retaining Baby Boomer Volunteers**

Be ready for some new management experiences with the influx of Baby Boomers into your volunteer ranks. Here are some specific tips that will help you retain Baby Boomer volunteers:

- Many Baby Boomers have been or are currently in the workforce. They expect to be treated with a high degree of professionalism. They may be used to being consulted for their opinions, for instance, and to having an adequate work station.
- Some will have held management positions. As a volunteer manager, keep in mind a Boomer's level of education and expertise. Avoid assuming that someone can't do something if they don't have a college education.
- Provide updated and appropriate incentives. Annual recognition banquets and award items such as pins and certificates may not be an effective reward for Boomer volunteers. Consider, instead, gift certificates to popular restaurants or stores, free or discounted admissions, tickets to cultural events, or even frequent flier miles. Ask your volunteers what they will find meaningful as recognition.

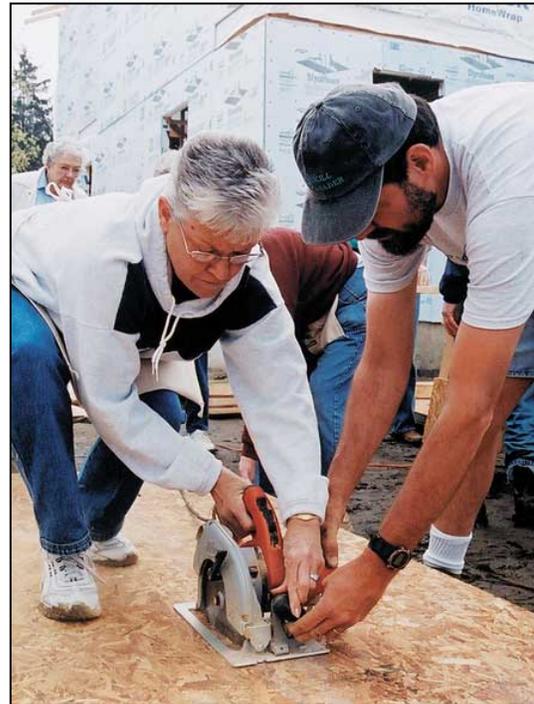
Source: *Ask the expert: Andrea S. Taylor, Ph.D., Temple University Center for Intergenerational Learning.*

### **Recognizing Boomer Volunteers and Their Successes**

It can be quite rewarding to volunteers to feel recognized and appreciated for their efforts. If volunteers feel appreciated and successful they will likely become advocates for the program, continue their commitment, or respond positively to a future request for service.

Here are some ways to support volunteer success and recognize contributions:

- Build tangible milestones or progress checks into the volunteer experience so that volunteers can see their effects and accomplishments
- Provide check-in opportunities for volunteers to communicate and share their successes and concerns
- Share success stories of the service-learning project/program, including volunteer contributions, with media and in public forums. Share as well with recruitment sources, such as local employers or community organizations.
- Offer appropriate support for volunteer expenses, such as mileage and supplies
- Commemorate volunteer service with a reward or gift, such as certificates from local restaurants, cultural attractions, or retailers
- Recognize volunteer contributions through personal verbal communication, thank-you cards, and public opportunities, such as newsletters and websites. Student participation in volunteer recognition enables them to express genuine appreciation and to learn important social skills.
- Include volunteers in the service-learning evaluation loop. This reinforces that you value not only their labor, but also their ideas and opinions.
- Ask volunteers to participate in brainstorming sessions that enable the service-learning program to move ahead and grow



## V. Conclusion

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An important goal of the Corporation for National and Community Service's SaYES Initiative is to provide extra help for local service-learning and programs by increasing the number of age 55+ adults volunteering in schools to help carry out quality service-learning.

In creating ***Making the Connection: SaYES to Intergenerational Service-Learning*** we have drawn from existing research, practitioner wisdom, and effective practices from the field. Our charge was to provide ideas and tools for forging effective partnerships between schools carrying out service-learning projects and Senior Corps projects and other organizations that recruit, place and support age 50+ volunteers. This printed guide is based on the online course *Making the Connection: SaYES to Intergenerational Learning* (available at: <http://servicelearning.org/resources/sayes/index.php>) and can be used alone or in tandem with the online version, depending on your program needs.

**The next steps are yours...** Your charge now, with the SaYES *Making the Connection* materials in hand, is to go to work to build local capacity for new and successful service-learning/older adult volunteer program collaborations. Such collaborations have the potential to enrich students' learning, get things done in your community and beyond, and establish some wonderful relationships across generations, as well.

## **VI. Appendices: Course Tools**

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These appendices contain the adaptable tools and handouts referenced in this guide.

## **Appendix A. Overview**

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### **Tool A1: Boomer Cohorts and Formative Experiences**

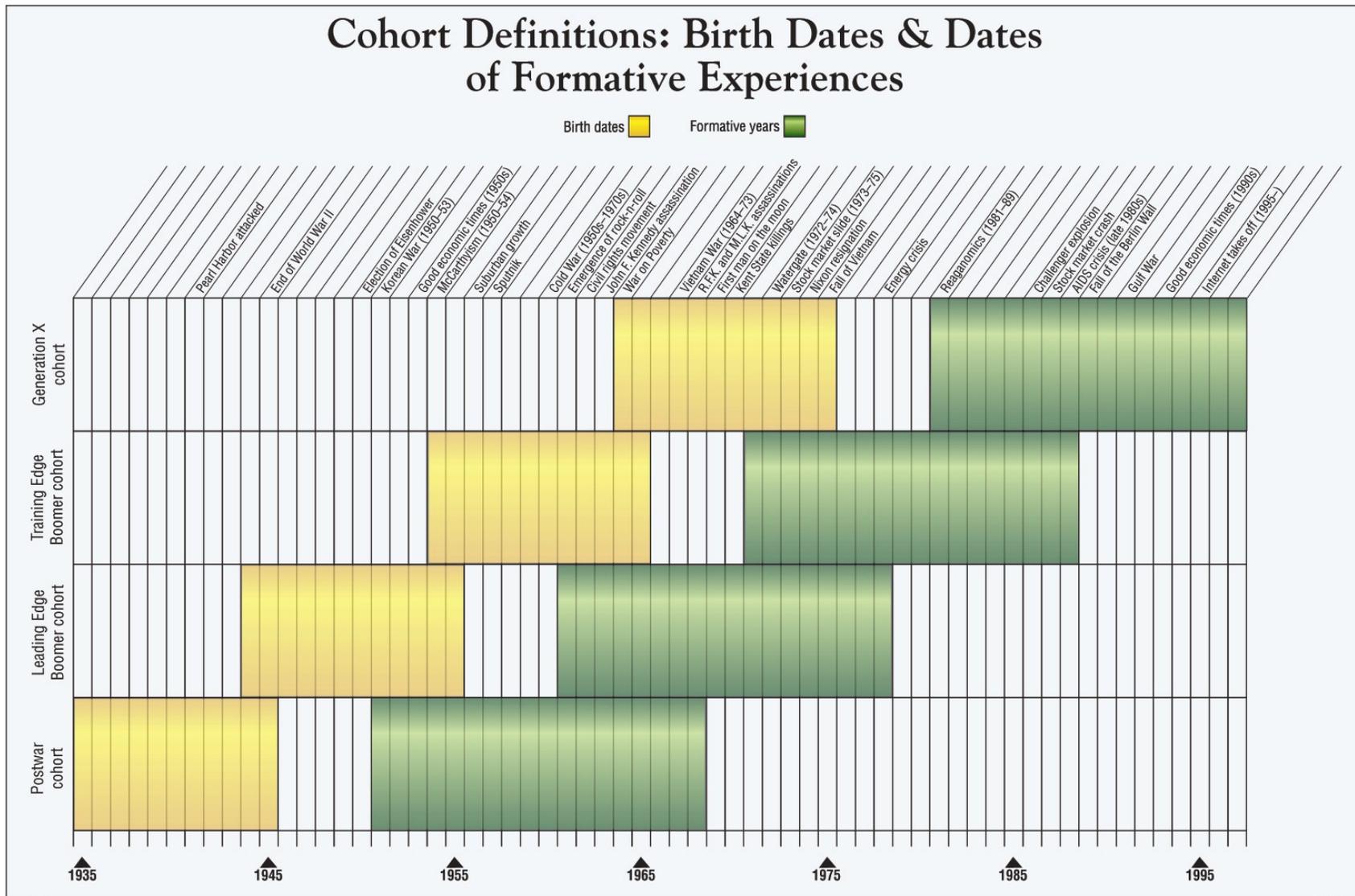
See this chart of events that have influenced Baby Boomers.

### **Tool A2: Quick Facts About Baby Boomers**

Find out about the Baby Boomer population with this fact sheet.

### **Tool A3: Boomer Differences: One Size Doesn't Fit All**

Not all Baby Boomers are the same.



Source: *After 50: How the Baby Boom Will Redefine the Mature Market*

## Baby Boomer Quick Facts

<b>Boomer Population</b>	<ul style="list-style-type: none"> <li>• 77 million born between 1946 and 1964</li> </ul>
<b>Boomer Physical Health</b>	<ul style="list-style-type: none"> <li>• Life expectancy (women: 83 years; men: 79 years)</li> <li>• More likely to exercise than previous generation</li> <li>• Less likely to smoke than previous generation</li> <li>• More likely to be obese than previous generation (women: 40%; men: 33%)</li> <li>• Dislike labels evoking chronological age</li> </ul>
<b>Boomer Race/Ethnicity</b>	<ul style="list-style-type: none"> <li>• More ethnically and racially diverse than previous generation (74% Boomers are white non-Hispanics compared to 81 % of previous generation)</li> <li>• African Americans: 41% provide volunteering via informal, neighborhood, and family networks outside of formal helping organizations</li> <li>• African Americans/Hispanics: Are more likely to cite religious considerations for volunteering</li> <li>• Hispanics: Cite motivation to volunteer to stay active, participate with family and friends, and build a community resource that could later return benefits</li> </ul>
<b>Boomer Residence</b>	<ul style="list-style-type: none"> <li>• Boomers are more likely to live in cities than previous generation. (Considerations for volunteer organizations: rural—oriented toward family activities, need for transportation; urban—competing with many other entertainment, cultural choices, other nonprofits)</li> <li>• 90% wish to stay in current residence during later years</li> </ul>
<b>Boomer Education</b>	<ul style="list-style-type: none"> <li>• 30% are college educated (compared to 20% previous generation)</li> </ul>
<b>Boomers and Technology</b>	<ul style="list-style-type: none"> <li>• Nearly 50% regularly use Internet</li> </ul>
<b>Boomer Income</b>	<ul style="list-style-type: none"> <li>• More affluent than previous generation, but economically diverse</li> <li>• Median income = \$62,300</li> <li>• 10% are in poverty; 25% earn less than \$35,000/year</li> <li>• Have more accumulated wealth, but also more debt than previous generation</li> <li>• Many feel their generation will need more money to live comfortably in retirement than their parents' generation</li> </ul>
<b>Boomer Labor Trends</b>	<ul style="list-style-type: none"> <li>• Less than 5% have retired</li> <li>• Nearly 70% of workers over age 45 plan to continue working in retirement</li> </ul>
<b>Family Status</b>	<ul style="list-style-type: none"> <li>• 70% married</li> <li>• More likely than previous generation to divorced, separated, or never married</li> <li>• 50% of Boomers have children under 18 living with them</li> <li>• 30% of Boomers report caring for an older parent</li> </ul>
<b>Religious Affiliation</b>	<ul style="list-style-type: none"> <li>• Lower level of religious affiliation than previous generation (religious affiliation has been associated with volunteerism/service in the past)</li> </ul>

*Compiled by Temple University Center for Intergenerational Learning. Please note: Intended to give a broad overview of the Baby Boomer generation. Should not be used to define the entire group.*

## One Size Does Not Fit All: Income Differences Among Boomers

### The Strugglers (9%)

**Income Level:** Approximately \$30,000 below median income (\$51,700) of Boomers in total survey

**Genders:** Female 64%; male 36%

**Savings for retirement:** None available to save

**Outlook:** Look ahead with little sense of optimism

***Implications for volunteering and incentives:***

- Flexible schedule
- Task-oriented
- Group camaraderie
- Stipend, reimbursement of volunteer expenses, discounts for medical, banquet recognition, retail discounts/certificates

### The Anxious (23%)

**Income Level:** Approximately \$10,000 below median income of Boomers in total survey

**Genders:** Female 55%; male 45%

**Savings for retirement:** Little or none available to save; expect to work part-time during retirement

**Outlook:** Look ahead with apprehension; have given little thought to retiring

***Implications for volunteering and incentives:***

- Flexible schedule, short-term projects (one day, weekend), resume building
- Meet new people, potential employers
- Stipend, reimbursement of volunteer expenses, discounts for medical, accrue points to cash in for services, retain discounts/certificates

### The Enthusiasts (13%)

**Income level:** Median income of \$59,300

**Genders:** Male 55%; female 45%

**Savings for retirement:** 88% satisfied with amount of money putting aside

**Outlook:** Eager to reach retirement age when do not expect to work at all;

***Implications for volunteering and incentives:***

- Flexible schedule, high-impact opportunities, leadership/decision-making opportunities, design own opportunities, cause-oriented projects
- Recreational/social activities (want fun)
- Media recognition
- Drawings for trips, cultural activities, educational reimbursement, restaurant certificates

## One Size Doesn't Fit All: Income Differences Among Boomers, (cont.)

### The Self Reliants (30%)

**Income Level:** Highest at \$69,100 per year median

**Genders:** Male 51%; female 49%

**Educational level:** Highest of all groups (40% have college education or more)

**Savings for retirement:** Aggressively saving and savings are diversified

**Outlook:** 99% of this group enjoy and want to continue working, at least part-time, after they retire. Interest and enjoyment of work are motivators.

***Implications for volunteering:***

- Fulfilling/meaningful opportunities, challenging/self-starter positions, self-directed tasks, optimal use of time/skills
- Reimbursement for expenses such as travel/meals, recognition of contributions with honor (such as naming a program or activity for them)

### Today's Traditionalists (25%)

**Income level:** \$49,400 median income

**Genders:** male 53%; female 47%

**Educational level:** 22% are college graduates

**Outlook:** Less sense of apprehension toward social support programs (such as Medicare and Social Security), but plan to work in traditional retirement years, in addition to relying on government programs.

***Implications for volunteering:***

- Flexible schedule
- Support for medical expenses, exchange of services

Source: AARP and Roper Starch Worldwide Inc.

## **Appendix B. Linking Volunteer Organizations and Schools: Characteristics of Effective Partnerships**

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### **Tool B1: Collaboration: These Factors Influence Success**

Use this chart of factors to ask important questions about your collaboration.

### **Tool B2: Questions About Adult Roles, Volunteer Support, and Physical Needs**

This fact sheet will help you learn more about adult volunteers.

### **Tool B3: Checklist for Assessing Quality of the Volunteer Placement Site**

You want a quality placement for the volunteers you recruit, and this sheet will help you assess placement sites.

### **Tool B4: Questions About Partner Roles in a SaYES Partnership**

You already know a lot about partnerships. With its questions this sheet will help you go deeper into just how a SaYES partnership works.

### **Tool B5: Ten Points for Successful Partnering Negotiations**

These important points will get you started when you want to make the initial contact for the SaYES partnership.

### **Tool B6: Memorandum of Understanding (MOU) Worksheet**

Once you have a potential SaYES partnership, use this worksheet to gather information so you can formalize the arrangement with a well-written MOU.

### **Tool B7: Sample Memorandum of Understanding (MOU)**

Take the information from the MOU worksheet and use this sample as a model to write an MOU for your SaYES partnership.

## Collaboration: These Factors Influence Success

### Environment

- There's a history of cooperation in the community
- Group(s) to collaborate seen as leader(s) in community
- There's a favorable political/social climate

### Collaboration Membership Characteristics

- Mutual respect, understanding, trust
- Appropriate member cross-section
- Members see collaborating in their self-interest
- There's ability to compromise

### Process and Structure

- Collaborators share a stake in both the process and the outcomes
- There are multiple layers of decision-making
- There is flexibility in structure and in the process
- Clear roles and policy guidelines are developed
- Process and structure are adaptable
- Appropriate pace of development

### Communication

- There is open and frequent communication
- Collaborators established informal (personal) and formal communication links

### Purpose

- Collaboration has concrete, attainable goals and objectives
- Collaborators have shared vision of purpose
- Collaboration has a unique purpose (doesn't duplicate)

### Resources

- Funds are sufficient
- Collaboration has quality leadership

• Source: Mattessich, P.W., Murray-Close, M., & Monsey, B.R. (2001). *Collaboration: What makes it work* (2<sup>nd</sup> edition). St. Paul, MN: Amherst H. Wilder Foundation

• You may wish to access and complete the Wilder Collaboration Factors Inventory tool at:  
[http://surveys.wilder.org/public\\_cfi/index.php](http://surveys.wilder.org/public_cfi/index.php)

## **Conducting a Community Scan: Questions About Adult Roles, Volunteer Support, and Physical Needs**

These are questions to consider as you seek out a potential SaYES partner. The questions pertain to specific needs the joint effort will address. Do you have any other needs?

*Can the partners together fill the adult roles needed for the service-learning project?*

A key question service-learning coordinators need to ask is, what people-power exists within the school community in relation to service-learning? Are there gaps? Enlisting age 55+ volunteers through strategic partnering is a way to fill those gaps. Volunteers can assist in service-learning in many ways, but there are certain responsibilities that school personnel or students should fill.

In identifying potential partners, both volunteer organizations and schools need to be aware of the adult roles the service-learning endeavor calls for, of the professional responsibilities of teachers and other school personnel to support student learning, and of any constraints upon volunteers in filling roles due to school policies, collective bargaining agreements, and responsibilities for student safety. Volunteer organizations need to take the lead from schools in these areas because service-learning is often part of the school curriculum.

*Will the SaYES partnership provide a volunteer opportunity that is accessible and attractive to Baby Boomers and other age 55+ volunteers?*

Many agencies are used to recruiting and enlisting volunteers, but not always for the array of tasks that might attract Boomers. Research tells us that Boomers want flexible, engaging volunteer opportunities—more than stuffing envelopes. Time requirements are one consideration: Do volunteers need to commit for a full academic year? Or, is this a shorter-term or episodic commitment? Are there ways volunteers can support a service-learning project in less time-intensive capacities, even if the need is ongoing? SaYES partners should think through the entire range of roles volunteers might play to support the service-learning project.

*What are the physical demands of the volunteer assignment?*

Do volunteers need to be able to come to the school to support the service-learning project? Might some volunteer support be garnered at the partner organization site, at a service-learning site, or in the volunteer's home or workplace? Can the school accommodate and provide the workspace volunteers need? If not, it might be wise to seek a volunteer organization partner with workspace available for use by volunteers.

## Checklist for Assessing Quality of the Volunteer Placement Site

Print this sheet and use it to check that essential components are in place. Ask yourself the following questions as you assess potential SaYES placement sites.

- A. Questions About Volunteer Training and Support**
  1. What types of ongoing training and support will the school/service-learning site provide?
  2. What pre-service training will the school provide? What will the volunteer organization provide?
  3. When will volunteers have structured opportunities for reflection and team support?
  4. How will volunteers access appropriate staff to address any questions or concerns?
  
- B. Questions About Outcomes and Performance**
  1. What service-learning outcomes have been established for students?
  2. How will volunteer success be measured?
  3. What information (data) will be used to assess volunteer impact?
  4. Are other relevant data being collected? (For example, surveys that solicit feedback from teachers and students about project management.)
  5. Is the education site willing to assist you in collecting data you may need for the purposes of your volunteer program?
  
- C. Questions About Caring Relationships Among Participants**
  1. How will the placement site foster relationship-building among staff, students, and volunteers?
  2. Will/can volunteers work in teams?
  3. Will more experienced volunteers or staff members mentor new volunteers?
  4. Are there some opportunities for “differentiated volunteering?” (Are there opportunities at this site to place volunteers in various roles, based on differing expertise, interests, and personalities?)
  5. Will volunteers be acknowledged and celebrated for their contributions?

## Questions About Partner Roles in a SaYES Partnership

The following questions will help you think about the roles organizations and people will play in your proposed SaYES partnership.

- Questions about the roles each organization will play
  - What type of partnership are we interested in?
  - Who takes responsibility for what? Does the school take responsibility only for the curricular aspects? Does the volunteer organization take responsibility only for volunteer recruitment and placement? What other key roles need to be assigned?
- Questions about the roles and tasks of specific staff in partnership implementation
  - What are the roles and tasks to be performed?
  - How will leadership roles be defined? Will leadership be shared?
  - Do you wish to assign staff to teams within or across partners?
  - Are there some staff roles or tasks that function across the entire effort to support service-learning?
- Questions about roles for students and volunteers in the partnership
  - What roles are appropriate for the age and developmental level of the students?
  - What roles are appropriate for volunteers? Do some roles involve working directly with the students? Are there other roles for volunteers as well?
  - What type of volunteer screening requirements are in place? Whose responsibility is it to conduct screening and background checks?
  - What training will adults and students receive so they can perform their roles effectively? Who will design and provide that training?
  - Do you want relationships between students and adults limited to this endeavor or are you trying to build longer-lasting relationships? How will this affect how you structure adult and student roles and interactions?

## Ten Points for Successful Partnering Negotiations

Negotiating your partnership agreement is a very important step. Consider these points as you launch your SaYES collaboration.

1. *Honor the relationship.* Consider negotiating an opportunity for positive relationship building. This is a time to open up paths of communication and to establish trust.
2. *Create a negotiation environment that encourages innovation.* A positive climate can allow you and a new partner to brainstorm new ideas and think creatively.
3. *Be realistic and fair.* Think about bending on things that are small; save concerns for the areas where you cannot bend for good reasons. Two agencies that partner should always consult their programs' financial and legal advisors before finalizing an agreement.
4. *Recognize that each partner and partnership is unique.* Each partnership should meet the needs of those involved. Utilize the strengths of each partner to create an alliance that will work for this situation.
5. *Engage in active listening.* Focus on what others say, both the actual words and the underlying meaning. Your goal should be to understand the interests upon which you are building a partnership. Active listening shows respect and builds trust.
6. *Know your bottom line.* Fairness comes when neither partner feels they've been taken advantage of. It's important to know what you don't want, as much as what you do want before you negotiate. Anticipating your partner's needs as well as your own will lead to better negotiating.
7. *Know the difference between positions and interests.* Interests are the building blocks of negotiation. When you focus on what motivates you and your potential partner, you're talking about interests. Consider that when you take a position, it has potential to bog down negotiations if it's not in the interest of both partners.
8. *Come prepared to commit resources.* Partnering is about committing resources on the part of both partners. Resources will vary, depending on the people and agencies involved, but can take the form of staff, volunteers, materials, supplies, transportation, and facilities in some combination.
9. *Take a fresh look at practices and standards.* Challenge yourself to take a look at current practice and use this as an opportunity to meet your standards better or improve to higher standards. What can this partnership achieve?
10. *Allow sufficient time for partners to work out details.* Negotiation toward a quality partnership may take more than one meeting. Partners may need several meetings or follow-up conversations to develop a workable agreement, one meeting the needs and capacities of both partners. The agreement should provide sufficient detail to provide clarity about important features of the partnership. This is an important foundation for what may be lasting and important experiences for the staff, students, and volunteers involved.

Adapted from *Negotiating a Partnership Agreement: Wisdom from the field.*

**Memorandum of Understanding Worksheet**

**Directions: Print this sheet, and fill in the information below:**

**I. Date:**

**II. MOU between...**

**A. School or district**

1. Street address:

2. City, State ZIP:

3. Primary contact person:

4. Best contact number:

5. E-mail address:

6. Person authorized to sign this MOU (if different from above) and contact information

**B. Volunteer Organization**

1. Street address:

2. City, State ZIP:

3. Primary contact person:

4. Best contact number:

5. E-mail address:

6. Person authorized to sign this MOU (if different from above) and contact information

**III. Purpose(s) of this MOU:**

**A.**

**B.**

**IV. Scope of work covered by this MOU:**

[Describe the scope of the work the volunteer will perform for the service-learning institution.]

**V. Specific activities covered by this MOU:**

[List the “observable” activities the volunteer will be doing as part of this project.]

<b>VI. Responsibilities of partners covered by this MOU (including resource commitments):</b>	
<b>A. School or district:</b>	
<b>B. Volunteer organization:</b>	
<b>VII. Period of performance covered by this MOU:</b>	
<b>A. Beginning date:</b>	
<b>B. Ending date:</b>	
<b>VIII. Special conditions covered by this MOU:</b>	
[Describe special conditions such as ownership of materials, constraints due to involvement of minors, and/or specific agency conditions.]	
<b>IX. Evaluation of the work covered by this MOU:</b>	
[List the criteria that will be used to identify whether this partnership is achieving the stated purpose.]	

**[Sample Memorandum of Understanding]**

**Memorandum of Understanding**

**Pleasantville Community Garden Service-Learning Volunteer Partnership**

This Memorandum of Understanding (MOU) is made this 20th day of February, 2007 as a Volunteer Partnership between Highland School District and Washington County RSVP.

This MOU establishes that **Highland School District** and **Washington County RSVP** agree to the following terms and conditions as partners in the **Pleasantville Community Garden Service-Learning Volunteer Partnership** PROGRAM:

**Highland School District** will:

- Provide onsite supervision of students. (A garden site, garden tools, a tool shed, and water are to be provided under a separate agreement with the City of Pleasantville.)
- Enlist students from all classrooms at West Slope Elementary School to work on planning, planting, weeding, watering, and harvesting garden produce and flowers. Students will be enlisted to assist with distribution of harvested produce/flowers to the Pleasantville Food Bank and Highland Community Hospital.
- Develop appropriate curriculum and advise on the academic needs of participating youth.
- Assist in providing program evaluation data for participating students including grades, attendance records, discipline records, and counselor and teacher reports in accordance with Highland School District privacy of information policies.
- Provide teacher or parent volunteer contact for each classroom participating.
- Cooperate to the fullest extent possible with the Washington County RSVP Volunteer Coordinator.



## **Appendix C. Engaging Volunteers Age 55+ to Support Service-Learning Efforts: Strategies for Schools**

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### **Tool C1: Action Plan Worksheet for Schools**

Use to collect information and formulate a vision for the SaYES partnership.

### **Tool C2: Service-Learning Volunteer Inventory**

This tool will help you get to know the potential volunteer better.

### **Tool C3: Volunteer Position Description Worksheet**

When you are ready to attract Baby Boomer volunteers to your SaYES project, use this sheet to begin writing an effective volunteer position description.

### **Tool C4: Sample Position Descriptions**

Review these examples as you put together your own volunteer position descriptions.

## Action Plan Worksheet for Schools

**Use this worksheet to plan how you might partner with RSVP or another volunteer agency to support your service-learning project.**

### I. Project Information

<b>Project Name</b>	
<b>Subject Area(s)</b>	
<b>Grade Level</b>	
<b>Course Name</b>	
<b>Credit for Hours (or)</b>	
<b>Grade Credit</b>	( ) Yes ( ) No If yes: Amount of credit _____
<b>Duration</b>	
<b>Location</b>	
<b>Start Date</b>	
<b>End Date</b>	

### II. Partnership Plan

<b>Potential Partners</b> What organizations in your community are potential sources of older adult volunteers (e.g., RSVP, Volunteer Center, fraternal organizations, other community agencies)?	
<b>Partnership Goals</b> List the outcomes you hope to achieve by engaging older adult volunteers in your project (e.g., help with project logistics, providing adult mentors to youth engaged in service, better facilitation of small-group reflection, etc.)	
<b>School Resources Needed</b>	
<b>Volunteer Organization Resources Needed</b>	
<b>Evidence of Success</b> How will you know that the partnership is successful?	

## Service-Learning Volunteer Inventory

Volunteer Background Information	
<b>Name</b>	
<b>Address</b>	
<b>Best way to contact me</b>	Phone: _____ e-mail: _____
<b>Have you volunteered previously?</b>	( ) Yes ( ) No <b>If so, where did you volunteer?</b>
<b>If so, what type of volunteer service did you do?</b>	
<b>I want to volunteer now because...</b>	
<b>I am looking to volunteer with:</b>	CHECK [✓] all that apply: ( ) students in grades K-5 ( ) middle school students, grades 6-8 ( ) high school students, grades 9-12 ( ) just one student ( ) a small group of students ( ) other _____
<b>I have knowledge, skill, and/or background to engage in service that involves:</b>	CHECK [✓] all that you feel competent in for a volunteer assignment: ( ) tutoring/mentoring ( ) helping students with their homework ( ) doing computer work with students ( ) working with students who speak a second language [lang.] _____ ( ) the use of a variety of hand tools ( ) marketing a project or product ( ) public speaking or training ( ) event coordination ( ) artistic and other creative skills ( ) a specific cultural community (list) _____ ( ) other _____
<b>Are there any special features of a volunteer assignment that you are looking for?</b>	CHECK [✓] all that apply: ( ) opportunity to work with another volunteer or team of volunteers ( ) work indoors ( ) work outdoors—any sort of weather ( ) an assignment that lets me sit down most of the time ( ) an assignment that keeps me active ( ) an assignment that is not stressful ( ) a chance to learn new skills ( ) a short-term assignment ( ) an assignment that takes place every day of the week ( ) an assignment that is just once a week, and not on weekends ( ) a weekend-only assignment ( ) work that I can stay involved with for the next several years

## Volunteer Position Description Worksheet

Below are common categories for writing a volunteer position description. Print this sheet and fill in the information.

I. **TITLE:** Identify the volunteer role and focus of the work.

II. **MAJOR OBJECTIVE:** Write a short, concise statement reflecting the ultimate goals of the service to be performed.

III. **BENEFITS:** List all benefits to the volunteer, such as free parking, coffee, mileage reimbursement, training, materials usage, and so on. List all benefits to the service-learning project, student(s), class, and school.

IV. **QUALIFICATIONS:** List desired volunteer skills and qualities. Include specifics such as transportation and time requirements, as well as professional experience and personal qualities.

a.

b.

c.

d.

e.

f.

V. **RESPONSIBILITIES:** List specific duties the volunteer will carry out.

a.
b.
c.
d.
e.

VI. **ORIENTATION/TRAINING:** Describe the nature, content, and approximate hours of training you will require and/or provide.

--

VII. **TIME AND PLACE:** Include the predicted hours, schedule and location of volunteer services. Be specific.

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VIII. **COMMITMENT:** Be realistic and specific about the time commitment (duration as well as hours per week) required.

IX. **SUPERVISION:** List the name of the supervisor of the volunteer position and describe the nature and scope of the supervision.

## Volunteer Position Description Sample 1

### **Be a Mentor to Teen Tutors**

Each one teach one! Mature adult volunteers are needed for the Aim High school-based mentoring program at Lone Oak Elementary School. Volunteers will work with local high school students in a service-learning project to help students in grades 3-5 improve self esteem, make academic gains, and strive to reach their full potential. **Service-learning** is a teaching method that engages young people in addressing community issues, needs, or problems as part of their academic studies or another kind of intentional learning activity.

**Responsibilities:** Guide high school students to be effective homework and spelling coaches and serve as “buddies” to upper-elementary children.

**Qualifications:** Volunteers need to care about children, be good listeners, and have the ability to help teen buddies work with elementary students on homework assignments that involve reading and basic mathematics and science.

**Time and place:** Mentors to teens need to be available at least 2 hours/week after school from October-April, except during school breaks. The tutoring program takes place in the school cafeteria.

**Orientation/training:** An orientation and six hours of training are required.

**Benefits:** All training materials and program supplies will be provided.

## Volunteer Position Description Sample 2

### **Open Volunteer Position: Service-Learning Resource and Logistics Coordinator**

Youth Count Teen Volunteers is moving from the Jefferson County 4-H office to a school-based program in the Bay County School District. Three middle- and high-school teachers in the district need volunteers to help plan, coordinate, and implement service-learning projects integrated with the academic curriculum. **Service-learning** is a teaching method that engages young people in addressing community issues, needs, or problems as part of their academic studies or another kind of intentional learning activity.

**Title: Service-Learning Resource and Logistics Volunteer** (three volunteers needed)

**Major Objective:** Provide logistical support and coordination for service-learning teachers in the Youth Count Teen Volunteers program.

**Responsibilities:** Help plan, coordinate, and implement service-learning projects integrated with the academic curriculum. Locate community experts or other volunteers with needed skills and assist teachers with program logistics so that students can carry out service activities.

**Qualifications:** Background in education and working with youth desirable; need to be a self-starter and flexible during program transition period.

**Time and place:** School sites include Fowler and Adams Middle Schools, and Longpoint High School. Volunteers are needed for approximately 3 hours/week from October through April, except during school breaks.

**Orientation/training:** Staff at the 4-H and Bay County School District will provide orientation to the Youth Count Teen program and district policies, as well as training on relevant curriculum.

**Benefits:** Mileage/local travel costs reimbursed; training materials provided.

### Volunteer Position Description Sample 3

#### **Come Volunteer at a Historic Ranch!**

McLellan Living History Ranch in Paradise Canyon is seeking volunteers to serve as ranch tour guides. Do you have skills in blacksmithing, weaving, woodworking, or tinsmithing and an interest in sharing history with youth? Six volunteers will be trained to supervise students doing historic building and craft service-learning projects. **Service-learning** is a teaching method that engages young people in addressing community issues, needs, or problems as part of their academic studies or another kind of intentional learning activity.

#### **Title: Historic Ranch Craft Interpreters/Student Supervisors**

**Major Objective:** Provide interpretive ranch tours for youth and supervise students engaged in service-learning projects based at McLellan Living History Ranch.

**Responsibilities:** Specific volunteer duties include assisting teachers and students to integrate service projects with the school curriculum; sharing skills with students to help them carry-out service activities; coordinating program logistics for service activities at the ranch; and supervising students and tracking service hours. If tools/supplies are needed beyond ranch resources, volunteers may be asked to solicit donations from area businesses.

**Qualifications:** An interest in sharing history with youth (upper elementary-high school); skills in blacksmithing, weaving, woodworking, or tinsmithing are also desired.

**Time and place:** Volunteer positions require 6 hours/week and at least a 3-month continuous commitment to assist student service-learning projects. All activities occur at the ranch.

**Orientation/training:** Ranch volunteer orientation/training is provided and school screening of volunteers is required.

**Benefits:** Opportunity to work with a great staff, volunteers, and youth; free family membership to McLellan Ranch, including store discount.

## Volunteer Position Description Sample 4

### Serve Together Program and Training Volunteer Needed

Do you have a background in training and program coordination? Are you interested in working with multi-cultural youth and helping English language learners succeed in school? If so, consider this exciting volunteer opportunity.

Think Together is a network of after-school programs established to assist non-native English speaking students in Grove County District who are performing below grade level or are at-risk of grade retention. Serve Together is a new program being developed to further support these students. On Fridays, Serve Together will provide enrichment activities that promote community service and character development through a school-approved service-learning curriculum.

**Service-learning** is a teaching method that engages young people in addressing community issues, needs, or problems as part of their academic studies or another kind of intentional learning activity.

#### **Title: Serve Together Program and Training Assistant**

**Major Objective:** Assist in the coordination of weekly enrichment activities that promote community service and character development through a school-approved service-learning curriculum.

**Responsibilities:** Help Serve Together staff connect students with caring individuals from our community who will serve as positive role models and partners in service-learning projects. Duties will relate to mentor recruitment, training, and adult-youth get-to-know-you activities.

**Qualifications:** Must be both detail-oriented and a people person; some experience leading or presenting to small groups desirable and Spanish language proficiency a plus.

**Time and place:** The volunteer is needed 16 hours/week from September 10 through October (Tuesdays and Wednesdays are required days). Locations are the Township Office on Alder Street and school sites. Must have own transportation; mileage reimbursed.

**Orientation/training:** Provided by Serve Together Coordinator

**Benefits:** Help English language learners succeed both in and out of the classroom!

## Volunteer Position Description Sample 5

### Volunteer Opening: Youth Action Council Advisor

Making Community Connections is a service-learning program involving three high schools and 10 elementary schools in Warren County School District. Teachers develop service-learning project proposals based on their subject areas. Under the supervision of a district Service-Learning Coordinator, a Youth Action Council (YAC) of high school students selects three projects to pursue for the school-year. **Service-learning** is a teaching method that engages young people in addressing community issues, needs, or problems as part of their academic studies or another kind of intentional learning activity.

Three volunteers are needed to serve as Youth Action Council Advisors. The volunteers will help the YAC team with the logistics of organizing meetings, fundraising, activities in the schools, community outreach, and evaluation of service-learning projects.

**Title: Youth Action Council Advisor** (three needed)

**Major Objective:** Support and advise the Youth Action Council in meeting its objectives (see above).

**Responsibilities:** General assistance to the council including meeting logistics; fundraising, coordinating activities in the schools, community outreach, and project evaluation.

**Qualifications:** The volunteer who fills this role needs to be an enthusiastic and skilled project manager with the ability to cultivate students as apprentices, leading and letting go as needed.

**Time and place:** Volunteer duties take place at the district office on County Road B, at schools, and in the community. An October-May commitment is needed for approximately 6 hours/week.

**Orientation/training:** The YAC Advisors are trained and supervised by the Service-Learning Coordinator.

**Benefits:** Opportunity to be active in the community, to use management skills, and to work with youth. Local travel and incidental costs reimbursed.

## Volunteer Position Description Sample 6

### **Volunteer in the Great Outdoors: Outdoor Field Study Supervisor Needed**

Do you have a passion for the environment? Would you like to foster a similar passion in today's youth? Briarwood Environmental Education Program (BEEP) engages Marlborough District students (K-12) in outdoor laboratory field studies in the city-owned wetlands/woodlands of Briarwood Park. Volunteers are needed for direct, hands-on supervision and service-learning assistance to elementary classroom teachers and students collecting water-quality data for the city. **Service-learning** is a teaching method that engages young people in addressing community issues, needs, or problems as part of their academic studies or another kind of intentional learning activity.

**Title: Outdoor Field Study Chaperone**

**Major Objective:** Help engage Marlborough District students (K-12) in outdoor laboratory field studies to raise their awareness of water quality issues.

**Responsibilities:** Direct, hands-on supervision and service-learning assistance to elementary classroom teachers and students at Lombardy School who are collecting water-quality data for the city at monthly intervals for six months.

**Qualifications:** Volunteer needs to enjoy children and like being in the outdoors.

**Time and place:** Need to be available every first Wednesday afternoon from October-March. Volunteers will accompany teachers and students to and from the park via school bus.

**Orientation/training:** Lombardy volunteer coordinator and teachers will provide project-related training.

**Benefits:** Spend time in a beautiful park and help children learn about the environment while serving their community.

## Volunteer Position Description Sample 7

### **Help Alleviate Hunger in Your Community: Nutrition and End-Hunger Program Volunteer Position Available**

Child hunger is a global and local reality. The Campaign to End Child Hunger is an international nonprofit organization with a local chapter in Prairie Village that works to promote good nutrition and alleviate hunger in our county. Specialists visit schools and conduct activities that foster good eating habits; students engage in service-learning to help low-income families procure nutritious foods. Volunteers are needed to work directly with Prairie Village children, teaching them about nutrition, food safety, and how to take action to end hunger in their community.

**Service-learning** is a teaching method that engages young people in addressing community issues, needs, or problems as part of their academic studies or another kind of intentional learning activity.

#### **Title: Nutrition and End-Hunger Program Volunteer**

**Major Objective:** Provide students with an understanding of issues related to nutrition, food safety, and hunger.

**Responsibilities:** Work directly with Prairie Village children and youth, presenting in-classroom mini-lessons based on established curriculum.

**Qualifications:** This is a great opportunity for current or retired educators, nurses, and social workers. Hands-on experience with children in a classroom setting is a plus.

**Time and place:** Time commitment is one hour per week in the classroom for 4-6 weeks.

**Orientation/training:** Training, resources, and curriculum are provided by the Campaign to End Child Hunger.

**Benefits:** Be a part of the solution when it comes to the issue of hunger. Must have own transportation, but you will be reimbursed for mileage.

## Volunteer Position Description Sample 8

### **Windows for a Cause: Artist and Marketing Volunteers Needed**

The Family YMCA, in partnership with the Garden Heights Schools, offers art and service opportunities through the After-School Art Program (A.S.A.P). This extended learning opportunity in the arts for youth ages 11-15 also provides community service through the arts. The service-learning portion of the program involves working with youth to paint Grand Avenue store windows with food themes during October/November to encourage donations to local food banks. If you have an artistic bent, this is the opportunity for you!

**Service-learning** is a teaching method that engages young people in addressing community issues, needs, or problems as part of their academic studies or another kind of intentional learning activity.

#### **Title: Windows for a Cause: Artist and Marketing Volunteers**

**Major Objective:** Increase public donations to local food banks through student-led service-learning/arts program.

**Responsibilities:** Help students design themes and paint store windows. Other volunteers are needed to help students promote and market the drive to the community.

**Qualifications:** Volunteers with artistic abilities and a desire to work with youth are needed. Marketing volunteers will enthusiastically share project information with local media and businesses; writing and desktop computer skills are a plus.

**Time and place:** Time commitment is two afternoons/week late September through mid-November. Artist volunteers will meet at the YMCA and also accompany youth to Grand Avenue to conduct painting activities. Marketing volunteers will be headquartered at the YMCA, but need to make connections and visits with students to businesses around town to promote the project and themes.

**Orientation/training:** Peer training will be provided by experienced volunteers.

**Benefits:** Share your talents, and get to know your community. Build relationships with other adults and local youth while benefiting the hungry. All supplies are donated by local merchants.

## **Appendix D. Finding and Keeping Volunteers Age 55+: Strategies for Volunteer Organizations**

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### **Tool D1: The Changing Volunteer Paradigm**

Volunteers in the 21st century are not like volunteers of earlier years. This sheet provides information about some of those changes.

### **Tool D2: Creative Brief Worksheet**

This tool will get you started with your marketing and public relations effort to attract Boomer volunteers.

### **Tool D3: SaYES recruitment postcard: *Picture Yourself Making a Difference***

Use this postcard to recruit Baby Boomers.

### **Tool D4: Questions and Suggestions to Help Focus Your Boomer Recruitment Efforts**

Narrowing down recruiting efforts is often confusing. Here are some suggestions.

### **Tool D5: Ten Ways to Retire "Retirement" and Appeal to Boomers As Potential Service-Learning Volunteers**

Do you want to attract Boomer volunteers in greater numbers? Be sure to look at this sheet for some information about appealing to Boomers.

## The Changing Volunteer Paradigm

	<b>Old Paradigm</b>	<b>New Paradigm</b>
<b>Volunteer Motivation</b>	Civic duty	Improve the world and find personal fulfillment
<b>Volunteering Pattern</b>	Long term, regular	More short term, sporadic
<b>Volunteer Autonomy</b>	Limited: Volunteers receive preset guidelines, procedures	Increased: Volunteers active in developing their opportunities, in decision making
<b>Volunteer Expectations of Reward</b>	Low: Seek mostly recognition, appreciation; some expense reimbursement	Higher: Seek recognition, appreciation; expense reimbursement; possibly cash-equivalent incentives (tickets, class fee waivers)
<b>Volunteer Relationship to Organization</b>	Strong identification: Conforming, loyal	Loose identification: more individualistic, critical; may “walk” if unsatisfied
<b>Volunteer Manager View of Volunteer</b>	Subordinate: Volunteer provides a service	Partner: Volunteer goals for work, self a consideration
<b>Volunteer Manager Management Style</b>	Command and control; top-down; volunteer manager as expert, boss	More participatory; collaborative: volunteers have input, influence decisions; volunteer manager is “team leader”
<b>Interviewing/Placement Process</b>	Priority is organization/project needs; limited knowledge about volunteer; some skill assessment	Balance between organization and volunteer needs; assessment process more thorough—focus on “whole volunteer,” not just skills
<b>Volunteer Opportunities Offered</b>	Limited choice; mostly long-term and unskilled	Wider choice; greater diversity in tasks, time commitment, skill levels/types

Source: *Temple University Center for Intergenerational Learning*

## Creative Brief Worksheet

A quick walk-through of the creative brief process for Baby Boomers follows. Adapt this process to your local Boomer demographics and your SaYES context.

### 1. The target audience you wish to reach

**Questions: Who are we talking to? What is known about the target audience?**

General visions of/attitudes toward retirement years:

- Only a small minority look forward to conventional retirement
- Others are very anxious about retirement and default uneasily to planning on continuing to work
- Some just say, “It’s part of my life to work”
- Most are proud of their generation’s history of disrupting the status quo. They wish to live out the next stage of their lives differently than the generation before them, although, many Boomers aren’t sure what that will mean.
- More adventurous Boomers have begun to figure out their next life phase

### 2. Present relationship that the target audience has to your service/product

**Question: What do they think, feel, do now in relation to volunteering?**

- Most do not possess an all-consuming passion for service
- Service has a role, along with other interests, activities (family, travel, learning, volunteering are in their vision of the future)
- Boomers have a special attraction to support the most vulnerable
- Most vulnerable within Boomer generation may represent the most active volunteers (for example, women, racial/ethnic groups, disabled)
- General Boomer tendencies apply to service
  - Recognition for contributions (“Me” generation; used to being in the world)
  - Want choices: No one size to fit all
  - Tell it like it is, no duplicity
  - Respect autonomy (consider self-directed teams as structure for working in groups)

### 3. How you would like the relationship to change as a result of your communications

**Question: What do we want Boomers to think, feel, and do in the future?**

We want Boomers to feel recognized.

How that can happen:

- Recruit for volunteer positions with descriptions/titles
- Enable public recognition: Name mentioned in programs/brochures/flyers, Web site, stories about projects
- Structure project to include volunteers in meetings, decision-making
- Include in evaluations of project, performance

We want Boomers to have choices.

How that can happen:

- Provide opportunities for a number of volunteer roles
- Do not typecast Boomers based on their prior life roles, experience
- Offer opportunities that cater to a variety of personalities
- Offer varied opportunities in schedule, duration
- Offer opportunities for various demographic groups

We want to deal with Boomers forthrightly, “telling it like it is.”

How that can happen:

- Do not oversell or misrepresent the volunteer experience
- Write explicit volunteer position descriptions
- Communicate using direct language
- Do not create status-based cliques/roles

### 4. Insight: Statement to make the desired change happen

**Question: What message will move the target to make desired change?**

Some plausible recruitment messages targeting Baby Boomers for volunteer opportunities:

*“You have the knowledge to help another generation change the world”*

(Appeals to experience, not age; offers opportunity to give; appeals to interest in social change)

*“We promise adventure.”*

(Packages experience that, while unknown, is full of promise, not anxiety)

*“Help Wanted: Hard Workers Please Apply”*

(Direct and explicit; no duplicity)

Adapted from materials provided by Temple University Center for Intergenerational Learning, with assistance from Margaret Mark, Strategic Insights



**SaYES**  
Seniors and Youth Engaged in Service



**Picture  
yourself  
making a  
difference**

Help students learn and serve  
SaYES . . . Volunteer!

SaYES Recruitment Campaign  
Seeking adult volunteers age 55+



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SaYES Recruitment Campaign  
Seeking adult volunteers age 55+

You have received this postcard because someone believes that you'd make a great SaYES volunteer. The SaYES project involves volunteers age 55+ and young people in a community service project that is also a learning experience for the students.

To find out more about the SaYES program, please fill in the information below and return the card to the agency address listed to the right. If you're not interested, please pass this card along to someone you know who might wish to become a SaYES volunteer.

Thanks!

- Yes! I am interested in SaYES volunteering.**  
 **I would like to learn more about SaYES.**

Your name: \_\_\_\_\_

Daytime phone #: \_\_\_\_\_

Home address: \_\_\_\_\_

**SaYES**

Seniors and Youth Engaged In Service

postage  
here

Mail to:

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**SaYES**

Seniors and Youth Engaged In Service

postage  
here

Mail to:

postage  
here

Mail to:

## Questions and Suggestions To Help Focus Your Boomer Recruitment Efforts

**Where do Boomers reside?** At this time, most Baby Boomers are living in independent residential settings. Boomers are physically able and have not moved to senior-living environments. Boomers' homes are as wide-ranging in type and location as the general population's. Neighborhoods develop over time, so there will be some areas of town or residential developments that will be home to more Boomer-generation residents than younger families or young singles.

**Where do Boomers attend events or meetings?** Target special interest groups, such as the local Audubon Society chapter if you're doing an environmentally-focused project or an artists' cooperative if your project involves a community mural. Professional organizations and neighborhood associations are other groups that meet regularly.

**Where are Boomers employed?** More and more businesses are organizing employee volunteer groups that allow staff to take personal leave or use work time for community service. Some businesses even adopt a specific community cause. If you need help figuring out the best approach to the business community, contact your local chamber of commerce for more information about avenues for reaching potential business partners who may have these types of programs.

**Where do Boomers find recreation?** Here are just a few places where you might find Boomers involved in recreational activities: Municipal recreation centers; fitness clubs; golf courses; and regional recreational facilities. Beyond sports and outdoor activities, Boomers may frequent local libraries or bookstores.

**Where do Boomers gather for social events?** There may be a main street coffee shop, a community theater, or an arts center that functions as a community hub for some Boomers. Local historical societies are good place to locate mature adults who are interested in their communities and may be veteran volunteers. Annual community festivals and fairs are another venue for locating active Boomers. Contact event organizers to solicit suggestions for how to best reach out to Boomers through these venues.

Adapted from *Collaborating with Schools: A Guide for Community-Based Organizations* by Karen Dischler and Bonnie Schmidt

## Ten Ways To Retire “Retirement” and Appeal to Boomers as Potential SaYES Volunteers

1. **Appeal to Boomers, even retired Boomers, by “retiring” the concept of retirement.** Retirement means to “withdraw” or “retreat” and this is not the impression you wish to convey when recruiting a volunteer to support service-learning. Phrases such as “be engaged” and “involve yourself” are more on target.
2. **Realize retirement is a relatively new concept in human evolution and can be re-imagined.** Historically, elders have remained productive in society, relied on for their skills and wisdom. Call on your elder community to share wisdom and experience.
3. **Capitalize on opportunities offered by the restructuring currently occurring, or soon to occur, in Boomers’ lives.** Recruitment materials will be most effective that encourage potential volunteers to restructure priorities around what’s most important to them, such as relationships with people, making a difference through community service, or supporting youth in making a difference through service-learning.
4. **Call on Boomers to renew their zest for learning.** Many Boomers are interested in learning new things and will respond positively to opportunities that allow them to do so. This approach may get a response from those curious for knowledge and hungry for new or stimulating challenges.
5. **Emphasize opportunities to connect with a community of people who embrace growth and change.** A quality service-learning program encourages intellectual growth and a can-do approach to addressing community challenges. Highlighting those features of service-learning will attract Boomers who find those attributes worthwhile.
6. **Rekindle the spirit of exploration and risk-taking.** Now is a time when Boomers may be lucky enough to have fewer responsibilities than a decade earlier. With good health as well, they can take risks to embark on new journeys. Travel to distant places and active leisure are attractive, but service-learning can be pitched as a youthful adventure, as well.
7. **Remind prospective volunteers that their fullest potential may be just ahead.** Participating in a volunteer capacity to support service-learning may open up new possibilities to do things one might not have imagined without the opportunity to come aboard as a volunteer.

8. **Understand that Boomers look forward to more time flexibility and the chance to recharge.** Many Boomers understand the rejuvenating virtues of physical activity. If service-learning volunteer tasks involve physical activity, this could be a more enjoyable way to stay active than the local fitness center.
9. **Consider that Boomers naturally start to look back on their lives and think about some of their unfulfilled dreams.** Seeing youth who aspire is a way for older generations to revisit some of their childhood dreams while they encourage young people to learn and grow. Older adult volunteers may also reconnect with and achieve some of their own dreams.
10. **Call on potential Boomer volunteers to remember that they have the power to act on things they care passionately about.** Your service-learning project may strike such a passion. Your recruitment appeals should encourage them to be active about what they are passionate about.

These ten tips are inspired by a list generated from the publication, Stone, H., & Stone, M.C. (2004). *Too young to retire: 101 ways to start the rest of your life*. New York: Plume. ([www.2young2retire.com/tenways.html](http://www.2young2retire.com/tenways.html))

## VII. References

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National Service-Learning Clearinghouse (Resources index).  
[www.servicelearning.org/resources/a-z\\_topics/index.php](http://www.servicelearning.org/resources/a-z_topics/index.php)

The Resource Center. <http://nationalservice.gov/resources>

SaYES Initiative. <http://www.servicelearning.org/resources/sayes/index.php>

*Making the Connection: SaYES to Intergenerational Service-Learning* (online course).  
<http://www.servicelearning.org/resources/sayes/index.php>

Senior Corps. <http://www.seniorcorps.gov/>

RSVP. <http://seniorcorps.gov/about/programs/rsvp.asp>

Experience Corps. <http://www.experiencecorps.org/>

Generations United. <http://www.gu.org/>

National Service-Learning Partnership. <http://www.service-learningpartnership.org/>

The Points of Light Foundation & Volunteer Center National Network. (Directory of centers.)  
[www.pointsoflight.org/centers/find\\_center.cfm](http://www.pointsoflight.org/centers/find_center.cfm)

Temple University Center for Intergenerational Learning.  
<http://www.templecil.org/>

State education departments and agencies (SEAs). Search: <http://www.statelocalgov.net/>

U.S. Department of Education, National Center for Education Statistics. Search for local education agencies (LEAs)/local schools, school districts at:  
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