

# Regional Economic and Workforce Strategies: A Focus on the Mature Workforce



## *New Opportunities for Meeting Skill Needs*

Prepared by the Council for Adult and Experiential Learning (CAEL) and  
the Council on Competitiveness

July 2009



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We also thank The Atlantic Philanthropies for their dedication to exploring the wide range of issues facing mature workers and for their conviction that mature populations are an important untapped resource for communities. We are grateful to their support for the Tapping Mature Talent: Aging Worker Initiative.

Finally, we commend the U.S. Department of Labor for its new program that will fund ten grantees across the country to address mature worker issues and develop workforce development programs for this population. We hope that this report can be a valuable resource for this new program's grantees as well as other regions wanting to tap mature talent.

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### Introduction

Regions around the country are grappling with current and anticipated skills shortages and, in some cases, labor shortages. Economic prosperity depends heavily on the quality of the workforce, and yet far too few regions have recognized their best underutilized asset: the mature workforce.

Because mature workers are nearing traditional retirement age, they may not seem to be the obvious target of choice for workforce and economic development strategies. However, many mature workers are, in fact, interested in working past retirement age, either out of financial necessity (particularly given the recent economic downturn) or out of an interest in staying active and involved in the working world.

Mature workers bring many beneficial attributes to the workplace. Employers surveyed by the Center on Aging & Work/Workplace Flexibility at Boston College said that, compared to younger workers, older employees are more likely to have a strong work ethic, are reliable and loyal, have low turnover rates, and have high levels of skills (Pitt-Catsouphes et al 2007). In addition, a recent survey of workers aged 50+ conducted by AARP revealed that they are eager to learn and are particularly receptive to work-related training aimed at improving business and technical skills. The workers also reported that the training had a positive impact on them, including an increased ability to help co-workers, increased productivity, increased job satisfaction, and increased job responsibilities. Mature workers with less education and lower incomes were even more likely than their higher-skilled, higher-paid counterparts to report these training benefits (Towers Perrin 2008).

Mature workers therefore might be one of the most overlooked assets for regions needing skilled workers to support economic growth and innovation, particularly as key industries face skill and/or worker shortages. However, this may be changing. Some regions are beginning to consider how to design workforce training and job placement programs for mature workers, particularly low-skilled mature workers who might be able to advance to higher-skilled, high-demand jobs if offered access to training and education. Some workforce boards and One-Stop Career Centers are developing special programs to help connect mature workers to employment through training and education and job placement and readiness services.

This paper by the Council for Adult and Experiential Learning (CAEL) and the Council on Competitiveness provides a look at representative strategies and programs that regional leaders might consider to help the mature workforce transition to jobs that meet the needs of individual workers as well as employers. The paper is part of our **Tapping Mature Talent: Aging Worker Initiative**, funded by The Atlantic Philanthropies.

## Background: Working Past Traditional Retirement Age

In the past, workforce development initiatives generally have not targeted the mature workforce, since spending limited resources on training a 58-year-old who might retire at age 65 was not seen as a worthwhile investment with long-term impact. However, that view of mature workers is rapidly changing, given what we are now learning about this population. For example, the Merrill Lynch New Retirement Study (2006) reports that adults in the U.S. are expecting to retire later than the traditional 65 year milestone age. Today, the average age at which people expect to stop working completely is 70 or beyond, and almost half (45%) say they do not plan to stop working—ever. The average person expects to officially retire at age 61 but then work in some capacity (e.g., part time or seasonal work) for an average of nine years in retirement. The study also found that one-third of boomers aged 51 to 59 and three-quarters of adults aged 60 to 70 consider themselves retired, even though more than one-third of current retirees aged 51 to 70 are still working for pay.

The MetLife Mature Market Institute has outlined a number of reasons for this expectation of work in retirement, including

- Increased longevity
- Changing economic factors such as increased health care costs
- A growing skills shortage in many industries
- Different beliefs about work among the aging baby boomer generation
- [Lack of] financial resources available for retirement (David DeLong & Associates and Zogby International 2006)

## Regional Skill Needs: Meeting the Challenge with Mature Workers

Regions across the country, meanwhile, are concerned about meeting the needs of business and industry, particularly the workforce skills needs of employers in key industry sectors—or emerging industries—that will provide the backbone of local and regional economies. The mature workforce serves as a pool of labor that can help these regions meet local labor and skills needs.

One step toward making that happen is for workforce and economic development leaders to adapt their programs to be more inclusive of mature workers. But that alone may not be enough. Another key part of a region's role in integrating mature workers into larger workforce and economic development strategies is to reach out to employers and help them understand the importance of the mature workforce to their businesses and what kinds of policies and programs employers can implement internally to make the most of that promising pool of labor. Mature workers can only be an asset to a local or regional economy if employers are aware of this population's importance and are involved in the development of programs to attract, train, and retain them. In addition, programs through postsecondary institutions may also need to be designed in different ways to address some of the needs of mature workers, as well as their different career goals.

Regions need to consider a number of different kinds of approaches for developing the mature workforce, including:

- Connecting mature workers to new career pathways in high-demand, high-wage jobs, in addition to general training and work opportunities
- Providing entrepreneurship programs for mature workers
- Offering advice, networking events, resources and services to mature workers
- Encouraging postsecondary institutions and other education and training providers to offer specialized training and other services that address the needs of mature workers
- Encouraging employers to adopt new practices that facilitate the learning and careers of mature workers
- Encouraging policy makers to introduce measures and strategies to engage the mature workforce in new ways

These different approaches are explained in the sections below, and specific programs are provided in Appendix B. The profiles included in this paper and the appendix offer a representative sample of programs targeting the mature worker. This is by no means an exhaustive list or inventory of every program that currently exists. In addition, although certain programs may be relevant under more than one category, they are profiled only once in this report.

## Connecting Mature Workers to New Career Pathways in High-Demand, High-Wage Jobs, in Addition to General Training and Work Opportunities

Many mature workers want to continue working past traditional retirement age, but that does not mean that jobs in fast food or retail should be their only options. Mature workers are capable of contributing at higher levels, and they will very likely jump at opportunities to enter higher-skilled, higher-wage work, particularly since the mature population may be even more concerned about its financial well-being than are younger workers. As they get older, some workers may wish to keep their current jobs and just negotiate fewer hours. But survey results tell us that others may choose to make a transition to a different kind of job—for example, one that is less physically demanding, one that could permit more flexible work hours, or one that “contributes to the greater good” (MetLife Foundation and Civic Ventures 2005).

### *New Career Pathways for Mature Workers*

Pathways from their current employment to new kinds of work opportunities may not exist or be easy to identify, so regional leaders will need to find ways to develop those pathways in conjunction with employers and educational institutions. There are many industries that could benefit from retrained mature workers, and in fact there are many examples of career pathways initiatives in various sectors, developed in order to prepare lower-skilled workers for high-skilled, high-demand positions. For example, there are career pathways initiatives that have been developed for the healthcare (especially nursing), financial services,

biotechnology and advanced manufacturing industries. These could be adapted to include outreach to, and support services for, mature worker populations. Current examples for transitioning mature workers to teaching positions also provide some possible models:

- **Encore AfterSchool Program.** Encore AfterSchool is a pilot program recently launched by Aspiranet, a service provider to children and families. Aspiranet trains and places experienced adults interested in working with children in after-school-program jobs providing “income, meaning and purpose.” Encore AfterSchool utilizes the talents of mature workers and creates flexible work options for older adults, while simultaneously addressing the needs of young people for caring and consistent support—ultimately creating a stronger, intergenerational workforce to support local schools. See program profile in Appendix B.
- **Paraprofessional Science and Math Teacher Training.** With a grant from the Kauffman Foundation, CAEL is currently designing a transitions/encore careers program for corporate math and science professionals aged 55 and older to move into paraprofessional roles in high school math and science classrooms. The underlying assumption is that rather than putting math and science professionals through a lengthy teacher certification program, they could move more quickly into the classroom in a new paraprofessional category that will bring math and science depth to students. There are a number of interested school districts, and CAEL is currently building an implementation plan for this career pathway initiative.
- **Troops to Teachers.** A partnership between the Department of Education and the Department of Defense, Troops to Teachers is a nationally operated federal program that helps retiring military personnel begin careers as teachers. Troops to Teachers provides a range of assistance to retirees, including career counseling, information about state certification requirements, financial assistance to help cover the costs of classes and tests required for teaching certificates, and placement in schools serving low-income students. See program profile in Appendix B or visit <http://www.civicventures.org/breakthrough/reports/BTAreport.pdf> for more information, as this program received a 2007 MetLife Foundation/Civic Ventures BreakThrough Award.

## Job Training Programs

In addition to sector-specific career pathways programs, other kinds of workforce development programs should provide mature workers with access to job training and placement in higher-skilled jobs. Several models already exist.

- **Maturity Matters.** Administered through the Tecumseh Area Partnership, Inc. and Purdue University, the Indiana Maturity Matters program is part of the region’s U.S. Department of Labor WIRED (Workforce Innovation in Regional Economic Development) initiative. The focus of Maturity Matters is to increase the educational and training attainment of mature workers and increase the number of employers that implement mature-worker human-capital best practices, as strategies to improve the region’s economy. The initiative’s “Lifelong Learning System” includes a web-accessible database of learning opportunities targeted to develop needed regional skills and outreach, and consulting for employers. See program profile in Appendix B. (Note: The Tecumseh Area Partnership is a 501(c)3 organization that serves as the fiscal agent for workforce system grants to serve a 12 county region in Indiana.)

- **Senior Community Service Employment Program (SCSEP).** Authorized by the Older Americans Act and funded by the U.S. Department of Labor, SCSEP provides subsidized, part-time work-based training for low-income persons aged 55 and older who have poor employment prospects. Through this program, mature workers are placed in subsidized temporary training assignments with 501(c)3 nonprofit community organizations or public agencies, where they can develop job skills while searching for permanent employment, as well as provide valuable community service hours. While in their assignment, participants receive the higher of federal, state or local minimum wage for each hour of training. The program has 74 grantees—18 are national nonprofit organizations and 56 are units of state and territorial governments. AARP, National Council on Aging, and Experience Works are some of the nonprofit grantees. Space limitations preclude us from describing each SCSEP grantee in detail. To learn more about the providers nationwide, and how they offer SCSEP in conjunction with other work, visit <http://www.doleta.gov/Seniors/> for more detailed information on all grantees, or see the Experience Works program profile in Appendix B for one detailed example.<sup>1</sup>
- **One-Stop Career Centers (various).** One-Stop Career Centers across the country provide employment and training services of 16 federally funded programs at the local level. In 2005, the U.S. Department of Labor proposed several action steps that One-Stops could take to connect employers and older workers. According to the U.S. Government Accountability Office, several One-Stop Career Centers have followed through on these suggested action steps. For example, one One-Stop has provided older workers with one-on-one counseling and career assessment as well as workshops designed to help older workers learn basic computer and communication skills (US GAO 2008). Partnerships and collaborations with One-Stop Career Centers also hold great potential for SCSEP projects. For example, the Idaho Commission on Aging’s SCSEP project in Twin Falls is structurally integrated into the community’s local One-Stop (National Council on Aging 2002).

## *Job Placement Programs—Examples from State and Federal Agencies*

The public sector has in place several different programs that recruit mature workers from other industries for service in government agencies or in their communities. These, too, can serve as models for career pathways and job placement initiatives that regions might consider.

- **Boomerang Program.** Through a centralized database, the Boomerang program connects retired California state employees with part-time, temporary work assignments in state departments, and provides various state agencies with ready access to experienced workers for filling temporary hiring needs. The database contains the names and relevant experience, skills, and abilities of former state employees who have expressed an interest

<sup>1</sup> Another funding source for innovative older worker training projects is Section 502(e) in Title V of the Older Americans Act. This section—added in the 1981 amendments—directed the Secretary of Labor to establish experimental programs which provided new employment and training models and jobs in the private sector for SCSEP participants. Though this clause was altered in later reauthorizations, the current version (in the 2006 amendments) allows for the funding of pilot, demonstration and evaluation projects for unskilled, unemployed older individuals whose income is 125% of the poverty level (the same population that would be eligible for Title V in general). These projects are “to develop and implement techniques and approaches” (pilots and demonstrations), and “demonstrate the effectiveness of techniques and approaches” (evaluation) in addressing the employment and training needs of very low-income, unskilled, unemployed older adults.

in obtaining work during retirement, providing the state with immediate access to a pool of potential applicants. The Boomerang program simultaneously helps former state employees connect to new work opportunities and saves the state both time and money in locating qualified candidates that meet employment needs. See program profile in Appendix B.

- **Golden Opportunities for Lifelong Development (GOLD) and Business Outreach Liaison Development (BOLD).** The New Mexico Aging and Long-Term Services Department designed the GOLD program to appeal to retiring baby boomers who are looking for flexible, part-time, paid work to supplement their incomes and who wish, at the same time, to give back to their communities. Through the GOLD program, individuals 50 and older provide intergenerational mentoring services to at-risk individuals entering or re-entering the workforce and to others who may be experiencing barriers to employment. In addition to the GOLD program, the New Mexico Aging and Long-Term Services Department recently concluded a separate pilot program that employed retired and semi-retired business persons aged 50 and older. The BOLD program utilized mature workers to connect business and industry in their local areas with services available through One-Stop Employment Centers. Both programs were developed to help meet community and industry needs through the employment of older adults. See GOLD and BOLD program profiles in Appendix B.
- **FedExperience Transitions to Government.** Developed by Partnership for Public Service, the FedExperience program brings together federal agencies, corporate partners, and other stakeholders to match the government's critical hiring needs with the talents of experienced older workers. The Partnership is currently working with IBM as the major corporate talent source for this pilot program. The program identifies, recruits, and hires interested IBM employees and retirees for key jobs in the federal government. The first agency partner in this pilot program is the U.S. Department of the Treasury. Based on lessons learned from this initial effort, the Partnership plans to expand the pilot to other companies and agencies. See program profile in Appendix B.
- **Senior Environmental Employment (SEE) Program.** The U.S. Environmental Protection Agency (EPA) designed the SEE Program to provide retired and unemployed individuals 55 and over an opportunity to share their expertise and be engaged in full-time or part-time work with the EPA. The goal of the program is to support environmental projects and give older workers an opportunity to remain active while using skills and knowledge obtained during their working careers. See program profile in Appendix B.
- **One-Stop Career Centers (various).** One-Stop Career Centers have also started to address the job placement needs of mature workers. For example, one One-Stop has provided dislocated older workers with language instruction, construction and maintenance skills, and basic skills courses. The One-Stop also provided assistance on how to complete a job application and how to interview, which many of the workers had never done before. In addition, through job search assistance, the One-Stop placed some of the workers in new jobs, and assisted others in self-employment (US GAO 2008).

# Providing Entrepreneurship Programs for Mature Workers

Some older workers may want to craft their own work experience during retirement years, allowing for increased flexibility, creativity and independence, as well as control over the type and amount of work conducted. Self-employment can serve as an important step in the retirement process for many older adults, allowing them to transition out of the workforce at a slower pace. For the subset of mature workers who are interested in self-employment options, there is a need for accessible business-development planning and guidance.

A variety of the workshops referenced later in this paper provide mature workers with a platform for starting this conversation by encouraging older adults to think about entrepreneurship and self-employment as a career option. However, programs specifically designed to help mature entrepreneurs are somewhat rare. A few models provide some ideas for how to proceed:

- **FastTrac.** FastTrac is a comprehensive entrepreneurship-educational program, licensed by the Kauffman Foundation, that provides entrepreneurs with business insights, leadership skills and professional networking connections so they are prepared to create a new business or expand an existing enterprise. The FastTrac program includes practical, hands-on business development programs and workshops for existing entrepreneurs, aspiring entrepreneurs, as well as entrepreneurship curricula for college students. FastTrac offers programs on starting a business, growing a business, and growing a specialized business. FastTrac programs are delivered by over 300 alliance organizations including chambers of commerce, business development centers, local and regional economic development councils, colleges, universities, consulting firms, and many others. Certain programs are tailored towards low- to moderate-income persons and displaced workers. None of the training programs are specifically marketed as programs for mature entrepreneurs, yet the Kauffman Foundation has reported that Americans aged 55 to 64 form small businesses at rates that are far higher than those under 35 (Fairlie 2008), highlighting the need for such resources for older adults. To learn more about the various FastTrac programs and providers visit [www.fasttrac.org](http://www.fasttrac.org).
- **50+ Entrepreneur.** The Small Business Administration (SBA) is offering a new package of resources for older entrepreneurs looking to start both for-profit and nonprofit businesses. The website provides a self-assessment tool for 50+ individuals to determine if they are ready to start a new enterprise, as well as a variety of resources to get started including business planning, professional counseling and financial services. The website also offers online training programs, a resource library and connects 50+ entrepreneurs to four SBA business partners who can provide personalized assistance at no charge. For more information visit <http://www.sba.gov/50plusentrepreneur/>.
- **Plus 50 Initiative Models.** The American Association of Community Colleges (AACC) Plus 50 Initiative, a three-and-a-half-year effort to benchmark and showcase the most current and innovative programs at community colleges to engage the 50+ learner (described in greater detail later in the paper), is also funding postsecondary programs that incorporate entrepreneurship. A few examples include the following:
  - **Luzerne County Community College** in Nanticoke, PA, will provide courses and services that encourage new job skills development, as well as entrepreneurship for students aged 50 and over wanting to start a new business venture.

- **Northern Virginia Community College** will expand educational offerings targeting baby boomers and reach out to senior facilities with programs on retirement, personal finance, entrepreneurship, technology literacy and good health.
- **Clark College** in Vancouver, WA, will redesign its small-business development curriculum to offer second careers through business ownership at a wine and cooking school for wine hobbyists and food enthusiasts. In addition, a joint program with the Area Agency on Aging will train in-home caregivers.
- **Project GATE.** The U.S. Department of Labor has developed the Growing America Through Entrepreneurship Project (Project GATE), a collaborative project between the One-Stop Career Center system and the U.S. Small Business Administration to help emerging entrepreneurs in rural and urban communities achieve the American dream of owning their own businesses. Project GATE pilots at Virginia Community College and the Minnesota Department of Employment and Economic Development are focusing efforts on the mature worker population. For more information visit <http://www.doleta.gov/projectgate/> or see program profile in Appendix B.

Not only do entrepreneurship programs provide increased work options for older adults, they also directly affect regional economic development through the creation of new business. We expect to see more of these kinds of programs as interest in meeting the needs of mature worker populations grows.

## Offering Advice, Networking Events, Resources and Services to Mature Workers

Although mature workers have considerable work experience, they are also usually the ones who have the hardest time transitioning to the new employability requirements. In particular, older workers frequently have greater challenges in adopting new technologies and in adjusting to new industries and patterns of work after having worked in another industry for most of their lives. Therefore, it is important to develop and offer specialized resources and services that address the needs of mature workers, help them overcome potential barriers to employment, and link them to work and learning opportunities.

### *Mature Worker Workshops*

There are several examples of workshops that have been designed to help mature workers figure out what they will do during their retirement years. As part of its Tapping Mature Talent initiative, CAEL is developing a workshop that could be offered by regions to groups of mature workers to help them understand their current and potential work and service options, as well as opportunities for education and training. The workshop would be designed to help mature workers identify their goals and address any barriers. Workforce Investment Boards (WIBS) in each region will be offered training on how to facilitate these workshops. The WIB would then be able to offer the workshops as a service to companies and the workforce. Other workshop examples include the following:

- **2young2retire Workshops.** Developed by Howard and Marika Stone, authors of *Too Young to Retire: 101 Ways to Start the Rest of Your Life* and founders of [2young2retire.com](http://2young2retire.com), this interactive group workshop is designed to help adults 50 and older discover what matters most, and establish a plan for putting skills and experience

to good use, during the second half of life. The workshop addresses topics such as finding work that matters (paid or unpaid), self-employment, community activism, wellness and financial planning. Workshops are conducted locally by coaches, social workers, career counselors, and other professionals credentialed through the 2young2retire Certified Facilitator Training. To date, graduates of the training are bringing the 2young2retire course into their communities in 30 states, Canada, Australia and Europe at adult learning centers, community colleges, alumni organizations, Jewish Community Centers, senior centers, and places of work and worship. **Jewish Vocational Service (JVS) in San Francisco** is an example of such an organization offering the 2young2retire workshop. As trained facilitators, JVS career coaches help older workers think beyond retirement, explore the ongoing meaning and role of work in their life, clarify their work/life balance, and develop specific plans to continue work. For more information, visit [www.2young2retire.com](http://www.2young2retire.com) or visit [www.jvs.org](http://www.jvs.org) to learn more about how a local organization is utilizing this workshop.

- **50+ Career Workshop Series.** **AARP of Kentucky** and **Jewish Family and Vocational Service** collaboratively offer a quarterly workshop series for mature workers focused on “re-careering after 50.” The workshops target individuals who are rethinking retirement, considering career changes, looking for new professional opportunities, or are interested in planning for the second half of work life. As a part of this series, business and career consultants provide an introduction to AARP’s WorkSearch Assessment System (see next section for more details on this tool) and address topics including 50+ education and training resources, employment and career path options, the five big reasons not to retire, what employers are looking for, self-employment and networking. For more information, visit [www.jfvs.com](http://www.jfvs.com).
- **Easing In and Out of Retirement: The Next Chapter.** This quarterly workshop series is offered by the **Osher Lifelong Learning Institute at San Francisco State University** to help older adults determine what they want to do during traditional retirement years. One session, entitled “Volunteering, Working, Creating Your Own Business,” includes a panel in which mature workers discuss their experiences before, during and after “retirement,” how they discovered what they wanted to do, how they realized their goals, and how they are finding meaning and purpose in this new phase of life. Panelists talk about experiences with volunteering, starting a business, and starting a new career. Another session, “So You Want to Work After 55,” is an experiential workshop that helps older adults explore the changing definition of retirement, begin developing feasible goals, and put together specific action plans for future employment. For more information, visit <http://www.cel.sfsu.edu/olli/index.cfm>.

## *Boomer Job Fairs, Expositions and Events*

Hosting jobs fairs and events targeted towards older adults and their needs can be an effective way to match mature workers to the employers who would like to hire them. These forums also create a unique setting to conduct workshops and connect boomers to resources and experts who can provide guidance and support as they enter the next stage in their lives. For example, a One-Stop Career Center has held annual job fairs specifically for older workers (US GAO 2008). Other innovative examples include **Boomer Speed Dating** conducted by the **Center for Workforce Transition at Gateway Community College** and the **Boomer Expo** hosted by **Jewish Family and Vocational Service**. See program profiles in Appendix B.

## Internet Resources and Online Tools

There are a growing number of web-based resources specifically designed to help mature workers assess their skills and connect with educational programs and job opportunities. A few examples include:

- **AARP WorkSearch Assessment System.** This online assessment tool, developed by AARP, provides community-level job and career information and services to individuals who are seeking to remain in, or re-enter the workforce. It provides a variety of services, including interest and ability inventories, skills assessments, information about the community job market, and connections to local training and employment opportunities at no cost to the individual. It is intentionally offered only as an online resource to underscore the importance of technology literacy among mature workers and to help mature workers gain a greater comfort level with using technology for different purposes. See <http://aarpworksearch.org/> for more information on this tool.
- **Idealist.org Mid-Career Transitions Resource Center (MCTRC): Experienced Professionals and Encore Careerists Section.** This resource center is primarily designed to help individuals find nonprofit jobs during career transition periods. The MCTRC also links with strategic partners in the nonprofit, for-profit, and government sectors to train hiring professionals on the benefits of recruiting, training, and employing the mid-career workforce. The MCTRC supports individuals from a variety of backgrounds, but the most established work to date is with the aging workforce and the baby boomer demographic. There is a specific page on this website dedicated to experienced professionals and encore careerists that links mature workers to resources that help them discover how to get involved in the nonprofit sector. See [www.idealists.org](http://www.idealists.org) or the program profile in Appendix B.
- **Retired Brains.** This website is available to anyone, but is geared toward retired workers, older boomers, those about to retire, and seniors. Retired Brains connects older workers with employers seeking to hire them, and provides a variety of important senior-focused materials. Individuals may post a resume, search for available jobs, research key industries and build their portfolio. The resource offers help with resume writing, retirement planning, career consultation and continuing education and training. It also includes a list of featured employers interested in employing retired workers. See [www.retiredbrains.com](http://www.retiredbrains.com) or the program profile in Appendix B.
- **WiserWorker.com.** WiserWorker.com is dedicated to providing high quality employment opportunities and resources for the mature worker. The website features a resource center for employers and jobseekers and targeted job postings that offer a variety of employment opportunities, both hourly and salaried. Additional services include links to a national older worker job fair series, education and career training search tools, resume assistance, and a blog that allows baby boomers to share experiences and information. For more information, visit [www.wiserworker.com](http://www.wiserworker.com).

## New Funding Mechanisms to Pay for Training

Financing education and training poses a significant barrier to many working adults who want to return to school. This may be particularly true for mature workers, as an increasing number of older adults continue to work out of financial necessity. Therefore, it is important to design strategies for mature workers to leverage new sources of funding for education and training.

One example of an innovative funding mechanism is Lifelong Learning Accounts.

- **Lifelong Learning Accounts (LiLAs).** LiLAs are portable individual savings accounts for education and training that allow for employer matching contributions as well as matches from third parties. CAEL has successfully demonstrated these accounts in multiple sites across the country, and has recently launched a pilot program targeting lower-income and mature workers in the Bay Area. The program is being carried out in partnership with Jewish Vocational Service and is funded by The Atlantic Philanthropies. The goal of this particular pilot program is to test LiLAs as a strategy for removing the financial barrier to education and training for mature workers, especially those who are lower-income. See [www.lifelonglearningaccounts.org](http://www.lifelonglearningaccounts.org) or Appendix B for a general LiLA program profile.

## Intermediary Services

There are several examples of organizations that are serving in an intermediary capacity. They work with mature populations to prepare for new opportunities, and they help make connections to work and learning opportunities through direct outreach and services to employers and education providers. **Indiana's Tecumseh Area Partnership, CAEL, Jewish Vocational Service, National Council on Aging, Experience Works** and others (whose various programs are profiled above and in Appendix B) are just some examples of intermediaries working to establish connections between mature workers, employers and training programs. Other intermediary models include the following:

- **Coming of Age.** This program is run through a partnership of the Center for Intergenerational Learning at Temple University, PBS/NPR station WHYY, AARP Pennsylvania, and the United Way of Southeastern Pennsylvania. The initiative assists people aged 50 and over to explore their future and to connect and contribute to the community, and works with nonprofit organizations to strengthen their capacity by developing and offering meaningful paid and unpaid opportunities for mature workers. See program profile in Appendix B.
- **Life by Design Northwest.** This initiative brings together nine major institutions in Portland, Oregon (including AARP Oregon, Portland Community College, and Portland State University), to support older adults and people contemplating retirement by providing opportunities for assessment and life planning, lifelong learning and civic engagement. It provides workshops, networking opportunities and other services to these mature populations. In addition, the program recently offered a series of employee workshops that employers can make available to their workers. See program profile in Appendix B.
- **Mature Worker Connection.** The Pima Council on Aging developed this free job placement service to increase employment opportunities for mature workers and to educate employers about the benefits and advantages of a mature workforce. The Mature Worker Connection promotes the experience, skills, reliability, enthusiasm, and commitment to socially meaningful work of employees 50 and over, making job seekers more marketable to potential employers. See program profile in Appendix B or visit <http://www.civicventures.org/breakthrough/reports/BTAreport.pdf> for more information, as this program received a 2007 MetLife Foundation/Civic Ventures BreakThrough Award.

# Encouraging Postsecondary Institutions and Other Education and Training Providers to Offer Specialized Training and Other Services That Address the Needs of Mature Workers

## *Higher Education Initiatives*

There are a variety of programs and services offered to mature workers through postsecondary institutions which are designed to provide older adults with access to workplace training and skill development, certificate programs, credit for prior learning, and services such as transition assistance and peer mentoring. Below are a few examples:

- **American Association of Community Colleges (AACC) Plus 50 Initiative.** This three-and-a-half-year effort conducted by the AACC is designed to benchmark and showcase the most current and innovative programs at community colleges to engage learners aged 50 and older. The Plus 50 Initiative includes a pilot group of two-year institutions that will create or expand campus programs to engage the “Plus 50” population in learning, training and re-training programs, and/or volunteer, civic service activities. Overall goals of the initiative include expanding enrollment among adults 50 and older and creating programs to boost access and success for these students. AACC identified 15 colleges for this pilot program. Five of the 15 colleges will serve as mentor institutions to 10 demonstration colleges. Some of the newly funded and mentor programs are as follows:
  - **Joliet Junior College** in Illinois plans to offer workforce skills certificate programs to students over the age of 50 for new careers in high-growth jobs in healthcare and education.
  - **Richland College**, which is part of the Dallas County Community College District in Texas, will assess learning needs for baby boomers, develop life-enhancing curricula for plus 50 students seeking to re-define their lives, and offer opportunities to retrain experienced workers.
  - **Central Florida Community College** in Ocala, Florida will develop course offerings that will lead to new employment opportunities for plus 50 students, including online business classes, individual and corporate tax preparation courses, training in less physically demanding medical fields such as medical transcription, and intergenerational computer courses.
  - The **Community College of Spokane** in Washington will help plus 50 workers upgrade or gain new skills and receive re-training to fill regional job vacancies. The college will also expand course delivery to rural areas using distance learning, so that plus 50 students located farther from campus can participate.
  - **Century College** in Minnesota will help baby boomers retiring from professional and supervisory positions apply their leadership skills as community volunteers. They will also help plus 50 professionals who have been downsized out of their current jobs with skill development courses in healthcare and technology that enable them to re-enter the workforce.

For more information, see <http://plus50.aacc.nche.edu/>.

- **Community College Encore Career Projects.** Civic Ventures and the MetLife Foundation awarded ten community colleges with Encore Career Grants to develop a wide range of innovations designed to match boomers' experiences, skills, and interests to careers in critical fields facing labor shortages. One of the grant recipients, **Portland Community College**, developed a **Peer Mentoring Program** to provide individualized support to students 50 and older in transitioning into college life and careers. Another recipient, **Gateway Community College**, developed the **Center for Workforce Transition** to encourage workforce innovation and facilitate meaningful work experiences for boomers and their employers. In addition, the Center designed the Caregiver Career Development & Placement Program to help mature workers start a new career in the caregiver profession. See program profiles in Appendix B. To learn more about how these ten community colleges are preparing boomers for work in education, healthcare and social services, see Appendix C for a link to the October 2008 Pathways to Encore Careers report released by Civic Ventures and the MetLife Foundation.
- **Prior Learning Assessment (PLA) Programs.** Through PLA programs, life and work experiences such as employment, company-sponsored or military training, community service, independent research and travel study may be evaluated for credit toward an undergraduate degree. Saving both time and money, PLA programs can make it easier for mature learners to pursue and/or complete a college degree. See Appendix B for a sample profile of **Marylhurst University's PLA program**.
- **Short-Term Certificates of Completion.** The Gerontology Department at **Portland Community College** has developed job-focused Short-Term Certificates of Completion as a way to get adult students into jobs while they continue working on a gerontology degree. These certificates include courses required for the one-year certificate and AAS degree, so students can achieve a milestone that enables them to find immediate employment, while continuing to advance toward the AAS degree, which in turn articulates with a Bachelor level degree. Short-term, job-related certificate programs, such as the program at PCC, could be adapted to specifically target the training and employment needs of the mature workforce. See program profile in Appendix B.

## *Training at Times and Locations That Allow Individuals with Full-Time Jobs to Participate*

Many job training programs start with the assumption that their target clients are jobseekers who are disconnected from the labor force and not currently working. If the target population for training and development includes the mature workforce, this assumption may need to be revised. In addition, training and job placement programs may need to be redesigned so that they are offered at times and in places that are accessible to people who are working full time. Even though mature workers may be very interested in moving into more skilled jobs, they should not need to quit their current jobs to pursue those goals.

There are many examples of community colleges and other training providers that have adapted their program schedules to better meet the needs of working adults.

For example, in a benchmarking study that CAEL conducted with APQC, we profiled several institutions and their offerings for adult learners. At the time of our study:

- DePaul University's School for New Learning offered its courses at five campuses in a variety of delivery formats, including days, evenings, weekends, intensive five-week-long courses, self-study projects and online

- Athabasca University offered home study and paced delivery to groups of students
- Marylhurst University offered small group study options, Web-based classes, and the Weekend University, which gives students four different scheduling formats from which to choose: every other weekend over 11 weeks, every other weekend over six weeks, two weekend sessions (with extra course work) and one weekend session (with extra course work) (Thomas A. Flint & Associates 1999)

Model education and training providers offer their programs in the evenings, on weekends, and in online formats to accommodate work schedules. They also may offer intensive or accelerated schedules, or they may break courses and programs into smaller “chunks” so that students can learn at a pace that meets their specific learning and career needs. These are the kinds of strategies that publicly-funded training programs need to adopt when serving mature workers who need to be in a paying job while also pursuing the training that will help them continue to work in their retirement years.

## Encouraging Employers to Adopt New Practices that Facilitate the Learning and Careers of Mature Workers

Employers play a critical role in the development and implementation of effective regional strategies that incorporate the mature workforce. Therefore, although this topic is placed toward the end of this paper, regions need to place a high priority on reaching out to employers and working with them on their own internal strategies for the mature workforce.

As previously discussed, the mature workforce can only be an asset to a local or regional economy if employers are aware of this population’s importance, involved in the development of career pathways and training programs for mature workers, and willing to consider new kinds of practices to attract and retain them. Part of a region’s role in integrating mature workers into larger workforce development and economic development strategies is to reach out to employers and help them understand the importance of the mature workforce to their businesses. Some organizations like CAEL, AARP and the Indiana Maturity Matters initiative have developed tools to help employers assess their workforce from a demographic perspective and understand how looming retirements may or may not affect their labor force. Regions may also want to consider partnerships with local education and training providers to develop customized training programs for employers that address these issues. A model for this kind of work is found at **Portland Community College**:

- **Customized and Workplace Training.** The Customized and Workplace Training (CWT) program at Portland Community College provides training and development solutions for business, industry, and government worldwide. CWT recently developed a suite of offerings to help businesses identify and address issues related to an aging workforce and impending vacancies created by retirement. This Suite of Offerings is focused on providing an understanding of the impact on their business and workforce. CWT works with businesses to mitigate this impact by developing strategies designed to retain and recruit older workers, and by providing consulting on managing a multi-generational workplace. CWT also works in partnership with Life by Design Northwest to provide workshops for employers that are developing companywide strategies to incorporate mature workers into their workforce. See program profile in Appendix B.

## Employer Best Practices

Another method for helping employers develop their own mature-worker practices is to share with them some of the best practices used by employers nationwide. In this section we provide information on several initiatives that are showcasing model employers and the programs and strategies they have developed to attract and retain the mature workforce. Many of these programs offer simple and innovative ideas that could be replicated at the local or regional level.

AARP, for example, currently recognizes employers annually for their efforts to make effective use of the mature workforce. The four categories considered in the selection of the AARP Best Employers for Workers Over 50 winners are:

- flexible work options
- recruitment
- retiree work options
- training and development

The 2008 winners include:

- **Mercy Health System (MHS)**, which has implemented the **Mercy Retiree Association**, a free MHS program for those over 50. The program provides health insurance and financial counseling, a free prescription discount card, and sponsors senior activities such as brown bag lunches and trips. MHS offers numerous flexible work options, including Weekender Program (work only on weekends), Traveler Option (work 6-13 week assignments), Nursing Float Option (nurses are guaranteed benefits while floating departments), Registry Pool Option (work 48-96 hrs/month with benefits), 8-10-12 Hour Shift Options, Work at Home Option, and Work-To-Retire Program (work reduced hours/seasonally). For more information see: [http://www.aarp.org/money/work/best\\_employers/articles/mercy\\_health\\_system\\_2008.html](http://www.aarp.org/money/work/best_employers/articles/mercy_health_system_2008.html)
- **Blue Cross Blue Shield Association**, which established a **Mature Employee Retention Program** in response to changing workforce demographics. In the program, all employees aged 55+ are automatically eligible for special tuition reimbursement benefits, an in-house MBA program, discounted financial planning, free flu shots, pre-retirement workshops, "Lessons of Experience," and the "Fit Over 50" program. For more information see: [http://www.aarp.org/money/work/best\\_employers/articles/blue\\_cross\\_blue\\_shield\\_2008.html](http://www.aarp.org/money/work/best_employers/articles/blue_cross_blue_shield_2008.html)
- **Scripps Health**, which is committed to retaining experienced, mature employees. In 2004, the organization developed the **Scripps Center for Learning**, extending to all employees opportunities to develop, learn, and grow through training courses, tuition reimbursement, online training, certification, and other resources. The company uses senior placement agencies to target mature workers and retirees. It also extends alternative work arrangements to its full- and part-time employees including flex time, compressed work schedules, job sharing, telecommuting, and a formal phased retirement program. Full-time employees are eligible to move to part-time work on a permanent or temporary basis. The Scripps Life Cycle employment concept reviews ways of providing flexible work options and benefits to employees approaching retirement. Older workers are able to make in-service withdrawals from their retirement savings plan while still working and phasing

into retirement. The company offers its retirees temporary work assignments, consulting/contract work, telecommuting, as well as full- and part-time work. For more information see: [http://www.aarp.org/money/work/best\\_employers/articles/scripps\\_health\\_2008.html](http://www.aarp.org/money/work/best_employers/articles/scripps_health_2008.html)

The AARP website also provides descriptions of several other companies recognized for their strategies for mature workers. Please follow the link below for more details on the **2008 Best Employers for Workers Over 50**: <http://www.aarp.org/money/careers/employerresourcecenter/bestemployers/>.

Another resource highlighting both employers who exhibit best practices in recruiting, training and retaining the mature workforce, as well as the experiences of older workers themselves, is the annual **Prime Time Awards Program**, developed by **Experience Works**. The Prime Time Awards honor the achievements and contributions of older workers, their employers, and those who provide services to the mature workforce, including SCSEP participants and agencies. Experience Works developed the Prime Time Awards Program to help remove barriers and lessen stereotypes about older workers, and encourage more employers to seek the talents and skills that older workers bring to the workplace. To learn more about the awards program, and to read profiles of current and former award recipients, please visit [www.experienceworks.org](http://www.experienceworks.org).

In addition, the **MetLife Foundation** and **Civic Ventures** recognize nonprofit organizations and employers that utilize the experience and passion of workers 50 and older to deliver their mission and improve society. Recipients of the **2007 BreakThrough Award** range from organizations that serve as social purpose employment agencies to employers that are developing new jobs, flexible work options, and incentives for recruiting and retaining mature workers. Sample innovations include peer-to-peer services, new pathways that link encore careerists with employers, and health systems that place value on retaining experienced care providers. Two of these programs, Mature Worker Connection and Troops to Teachers, were profiled earlier in this paper. To learn more about the other organizations and employers, please see sample program profiles in Appendix B for **Leesburg Regional Medical Center and the Villages Regional Hospital, Nursing Home Ombudsman Agency of the Bluegrass, Inc., ReServe Elder Service, Inc., Retiree Work Opportunities Program, and the YMCA of Greater Rochester**. You may also visit <http://www.civicventures.org/breakthrough/reports/BTAreport.pdf> for the full report.

Another method for learning about companies leading in this area is the **Conference Board's Employer Practices Locator**, which is a searchable database of articles and reports that describe specific employer practices for mature workers. For more information see <http://www.conference-board.org/knowledge/knowledgeDB/matureWorkforce.cfm>. A quick review of some of these articles produced this sample list of best practices and employers that demonstrate them:

- Offering phased retirement—Principal Financial Group, Proctor & Gamble, Boeing and General Mills (Rafter 2008); Deere & Co. (Young, Piktialis and Rappaport 2007)
- Offering alternative pension calculation for those wanting a phased retirement—Deere & Co (Rafter 2008); Chicago Transit Authority (Selden 2008)
- Conducting deliberate recruitment of mature workers—B&Q, Hewlett Packard (Selden 2008)

- Tracking and stemming the knowledge loss from retirements—TVA, Duke Energy, and Georgia Power Company (Young, Piktialis and Rappaport 2007)
- Rehiring retirees (part-time)—Bon Secours Richmond Health System, Deere & Co. (Young, Piktialis and Rappaport 2007); The Aerospace Corporation (MetLife Market Institute and David DeLong & Associates 2007)
- Training managers on avoiding age discrimination (Young, Piktialis and Rappaport 2007)
- Offering flexible work options including part-time work or “snowbirding”—The CVS Snowbird program allows people to go from one part of the country to another (Toder, Johnson, Mermin and Lei 2008); Lancaster Laboratories (Larison 2008); Medical City Hospital in Dallas (Pope 2008)
- Training mature workers to serve as mentors to younger employees—CVS Caremark (Young, Piktialis and Rappaport 2007); Bombardier Aerospace and Hawker Beechcraft (McMillin 2007); Boston Scientific’s Apprenticeship Program (MetLife Market Institute and David DeLong & Associates 2007)
- Training for mature workers—Schneider National, Robert Half International (Pope 2008)
- Retirement planning seminars to help employees clarify their options—Weyerhaeuser (MetLife Market Institute and David DeLong & Associates 2007)

## Encouraging Policy Makers to Introduce Measures and Strategies to Engage the Mature Workforce in New Ways

The examples in this paper have described many different kinds of strategies that could be used to help mature workers access job training, postsecondary learning, and work opportunities to benefit regional economies. Throughout the paper, there are examples of public sector agencies that are playing important roles:

- The U.S. Department of Labor’s WIRED initiative, which has provided funding for Indiana’s Maturity Matters programs
- The U.S. Department of Labor’s oversight of the Senior Community Service Employment Program (SCSEP) and the Section 502(e) Private Sector Initiative
- California State Personnel Board’s Boomerang Program
- New Mexico’s GOLD and BOLD programs
- Federal work opportunities for mature individuals through FedExperience (Department of the Treasury) and Senior Environmental Employment Program (Environmental Protection Agency)
- The U.S. Department of Labor’s Growing America Through Entrepreneurship Project (Project GATE), which helps emerging entrepreneurs in rural and urban communities
- Several One-Stop Career Centers/Workforce Investment Boards are taking actions to serve mature workers through special job training, job placement, career fairs and workshops.

In addition to supporting these kinds of special initiatives, the public sector can also influence opportunities for mature workers through changes in public policies and by drawing attention to the needs of the mature workforce in other ways.

Two useful resources on this topic are a recent Civic Ventures report, “Building an Experience Dividend: State Governments Lead the Call to Engage Boomers” (Greenya & Golin 2008) and a National Governors Association issue brief, “Engaging Mature Adults in the Workforce” (NGA Center for Best Practices 2007). The NGA brief notes that state leaders and policymakers have an opportunity to advance mature workforce strategies because they can:

- Develop new information tools and improve existing systems that connect older adults to employment opportunities
- Promote lifelong learning by enhancing training and educational opportunities for mature workers
- Assess labor market needs to help fully engage older adults and review policies that could affect them as they remain in the labor market or try to reconnect to the workforce
- Raise awareness of the benefits of hiring older adults and improve perceptions of mature workers among employers

We would also add the following to the above list:

- Provide incentives to employers to engage in attraction and retention programs for older workers

Several states are taking strong leadership roles in advancing agendas that help mature workers and learners. A few samples are profiled below:

- **Arizona’s Mature Workforce Initiative (MWI)**—In February 2005, then Governor Janet Napolitano launched the Mature Workforce Initiative in order to raise visibility, awareness, and appreciation of employment opportunities for mature workers, while addressing labor force shortages in the business sector. In addition, the MWI aims to provide mature workers with new points of access to training that will allow them to remain competitive in the job market, and to provide them connections to employers who value their experience. Several key activities undertaken to date include:
  - Increasing awareness about the changing nature of Arizona’s workforce and the role of the mature worker in the labor force of the future.
  - Collecting and compiling data about the mature workforce.
  - Branding the initiative through development of the Mature Worker logo and slogan.
  - Increasing employment opportunities of mature workers.
  - Hosting three regional-invitational *Arizona Summits on the Mature Workforce*. The Summits brought together more than 250 executive-level business and industry leaders from all sectors of the community, and more than 50 mature workers of all professional and socio-economic backgrounds, to explore the identified obstacles and discuss possible solutions and actions needed. The outcome of the Summits is a set of recommended actions for the Governor’s consideration.

An important innovation currently underway in Arizona is the **Mature Worker-Friendly Employer Certification**, a process that recognizes employers who maintain policies, practices and programs consistent with employment of people aged 50 and older based solely on their proficiency, qualifications and contribution, and on terms and conditions comparable to younger individuals. The goal of the Mature-Worker-Friendly Employer Certification program is to increase the number of Arizona employers that employ mature workers. The first round of certifications was awarded in December 2008 and the recipients are eligible to receive free training at the Governor’s Conference on Aging. For more information on the certification process, or to learn about the certified employers, see [www.azmatureworkers.com](http://www.azmatureworkers.com). (Additional source: phone conversation with Melanie Starns and Barry Spiker of the Arizona Mature Workforce Initiative).

- **Massachusetts** recently established the **50+ Workforce Innovation Task Force**, which is modeling itself on the Arizona MWI. Efforts are underway in that state to recruit employers to participate in the initiative and to develop work groups for five key strategic areas: public education and awareness; training and technical assistance; linkages between employers and mature workers; innovations and incentives; and policy and regulatory changes.

This task force resulted from the combined efforts of the Massachusetts Coalition on Vital Aging and Experience Wave, a national organization focused on advocating policy change for mature worker and civic engagement issues. The two organizations worked with lawmakers on legislation that established the task force.

- **New York**—New York State has recently established through legislation a **Mature Worker Taskforce** whose overarching purpose is “to improve economic development and the economic security of older adults through opportunities that recognize the value of mature workers and also seek to retain, retrain and offer second careers that fill anticipated areas where there will be a labor deficit.” Four objectives of the task force are to:

- Identify best practices for hiring, retaining, and retraining mature workers.
- Identify and address statutory and regulatory provisions limiting opportunities for mature workers.
- Serve as a clearinghouse for businesses seeking to hire mature workers and for mature workers seeking employment.
- Assess effectiveness and cost of mature worker-related programs New York State has implemented. (For more information, see New York State’s Office for the Aging, [www.aging.ny.gov](http://www.aging.ny.gov).)

Leadership behind the creation of the Mature Worker Taskforce came from New York Assemblyman Steve Englebright and State Senator Martin Golden. These legislators have also introduced bills that propose to:

- Allow local governments to offer a property tax credit to older homeowners who volunteer.
- Provide funding for retraining older workers.
- Establish a certification program that would designate employers as “older worker-friendly.”
- Create educational centers at colleges focusing on older learners.

- Encourage intergenerational tutoring and mentoring.
- Ensure that the workforce board addresses challenges faced by older workers.
- Allow people over 60 to take state university courses for credit at no charge (Greenya & Golin 2008).

For more information on these bills, see Assemblyman Englebright's web article on the topic, <http://assembly.state.ny.us/mem/?ad=004&sh=story&story=21560>.

In addition to these examples of state policies, some nonprofit organizations are also focusing on public policy changes that would support mature workers and civic engagement. Two of these are the **National Council on Aging's MaturityWorks Alliance** and **Experience Wave**. Both provide additional recommendations for promoting wider opportunities and lifelong learning for mature workers. For more information visit [www.ncoa.org](http://www.ncoa.org) and [www.experiencewave.org](http://www.experiencewave.org). (Please note that Experience Wave is only available for a limited time.)

## Conclusion

Regions interested in developing strategies to include the mature workforce in new and innovative ways can use the above examples to start developing their own customized mature worker strategies. Such strategies can help to address local employer needs while also helping low-skilled mature workers access training and job opportunities that will help them stay actively engaged in work and maintain their financial well-being, even as they enter a stage in life that has been traditionally seen as the time to disengage from the working world.

Although these examples provide a variety of strategies for tapping into the mature workforce, CAEL and the Council on Competitiveness have concluded that these current models do not fully address the range of opportunities and needs of mature workers. With an eye toward the future, we have identified additional items that are critical for regions to consider when developing customized strategies and programs. Our reflections include the following:

- ***We Need Better Consideration of the Needs and Interests of Lower-Income Mature Workers.*** Only a small number of the current models are specifically targeted to address the needs of lower-income mature workers. Although some mature workers report that they view this period of life as an opportunity to do work that they find meaningful, large numbers of older adults will need to work past traditional retirement years out of financial necessity. Workers at multiple socio-economic levels will need to look for ways to continue working, either in their current field or in a new field. Some people may need to stay in traditional positions longer, while others may seek alternative work arrangements organized differently than their current jobs. However, little is currently known about the views of lower-income mature workers on retirement and what work during retirement could mean for them. Regions must consider this disconnect when developing training and job placement programs, making sure to reach out to lower-income older workers and identifying and addressing their needs and interests.

- ***We Cannot Forget the Potential for Creating New Entrepreneurs.*** As previously discussed, there are a few resources now available for older adults interested in starting a new business venture during traditional retirement years. The services provided by FastTrac, the Small Business Administration, Project GATE, and various community colleges serve as a critical first step in recognizing entrepreneurship as a viable option for mature workers. However, there is a need to build upon and expand these programs to make business development training and advising more accessible to the mature workforce. Regions should not shy away from incorporating entrepreneurship training and assistance into their mature worker initiatives.
- ***Mature Workers Need a Broader Range of Options.*** Many current models exist that focus on civic engagement, which one might define as connecting older adults to volunteer opportunities. These programs provide multiple benefits to older adults, the populations they serve, and the greater community. In addition to providing links to civic engagement programs, it is also important to connect older adults with opportunities for paid work, as a significant number of mature workers may need additional sources of financial support during retirement. Although civic engagement programs may not focus specifically on paid work, there are many excellent programs with long track records and lessons learned. We believe that regions could learn from these programs and resources, and that the civic engagement strategies and approaches could be adapted to help develop programs that create opportunities for paid work. See Appendix B for profiles of four sample civic engagement programs: **Experience Corps, RespectAbility, Retired Senior Volunteer Program (RSVP), and Wisdom Works.**
- ***New Mature Worker Initiatives Should Link to Economic Development Priorities.*** Many model programs address the need for tapping into the experience of the mature workforce and providing older adults with work options past traditional retirement years. However, merely connecting older workers to any and all available jobs may be insufficient. Rather, regions could approach this more strategically, by looking at the economic development priorities of the region and developing training, placement and career pathways programs that serve the current and projected needs of key industries in the region. Utilizing sector-based approaches and developing pathways to careers in high-demand, high-wage industries can help transform mature workers into a true economic asset for that region.

This is very much an emerging field, in that most of the examples of mature workforce strategies are in their earliest stages of development. Regions taking on this challenge may not have any experience in working with mature workforce populations, but by carefully thinking through the needed components of an initiative, by connecting mature workforce initiatives to larger workforce and economic development strategies, and by working in close partnership with employers and educational institutions, there is great potential. Regions may pioneer important new approaches for addressing both the needs of mature workers and their employers.

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## Appendix A: Contributors to this Paper

The ideas in this paper were discussed on a conference call organized by CAEL and the Council on Competitiveness on April 25, 2008. Participants and contributors included:

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## Connecting Mature Workers to New Career Pathways in High-Demand, High-Wage Jobs, in Addition to General Training and Work Opportunities

### Encore AfterSchool Program

Organization/Program	This initiative is piloted by <b>Aspiranet</b> in Oakland and San Jose, CA.
Program Purpose	Encore AfterSchool improves the quality of after school programs by creating a high-quality intergenerational workforce.
Program Description	<p>Encore AfterSchool was created to solve the very specific problem of staffing a large and growing number of after school programs in California. While most after school programs hire college-age staff members looking for temporary, part-time work, Encore AfterSchool seeks to recruit older adults, with the goal of offering a more stable, experienced workforce.</p> <p>Encore AfterSchool provides the following services:</p> <ul style="list-style-type: none"> <li>• Recruitment: Encore AfterSchool recruits experienced adults in San Jose and Oakland to work in after school programs.</li> <li>• Screening: Applicants are screened through interviews and background checks before placement.</li> <li>• Training for staff: Encore instructors receive training in after school practices, lesson planning and classroom management before finding placement in an after school program.</li> <li>• Training for employers: Programs hosting Encore instructors receive training in intergenerational workforce practices.</li> <li>• In-service training and check-ins: Throughout the school year, Encore AfterSchool will perform “check-ins” to ensure the success of Encore instructors and the programs in which they’re placed.</li> </ul> <p>All positions are part-time, paid positions.</p>
Progress	Within a year, Aspiranet hopes that 10 after school programs in both Oakland and San Jose will benefit from stable, talented, experienced staff members recruited, trained and placed by Encore AfterSchool. At the end of two years, the goal is to have 25% of the after school staff be 55 and older.
Contact Information	<p>David Brick Encore AfterSchool Project Director <a href="mailto:dbrick@aspiranet.org">dbrick@aspiranet.org</a></p> <p>Michael Funk Director of Policy and Partnerships <a href="mailto:mfunk@aspiranet.org">mfunk@aspiranet.org</a></p>
Source	<a href="http://www.aspiranet.org">www.aspiranet.org</a> and phone conversations/email exchanges with Michael Funk, David Brick and Star Bressler

## Troops to Teachers

Organization/Program	This federal program is funded by the Department of Education under the No Child Left Behind Act and operates under a partnership between the <b>Department of Education and the Department of Defense</b> . It is managed by the <b>Defense Activity for Non-Traditional Education Support (DANTES)</b> .
Program Purpose	Started in 1993, the Troops to Teachers program helps retiring military personnel with at least ten years of service begin new careers as teachers.
Program Description	<p>Troops to Teachers provides a range of help to retiring military personnel, including career counseling, information about state certification requirements, financial assistance to help cover the costs of classes and tests required for teaching certificates, and placement in schools serving low-income students.</p> <p>Troops to Teachers graduates offer mentoring to others going through the program. And, as a new benefit, graduates can now line up a job in certain school systems two or three years before they leave military service, making life planning a lot easier.</p> <p>Those who have served in the military bring discipline, commitment, and leadership skills to teaching. Troops to Teachers recruits are more likely to fill shortages in math and science, be minority and male, and to stay in the profession longer than other new teachers.</p>
Progress	Approximately 10,000 retired military personnel are now in second careers as public school teachers.
Contact Information	<p>William McAleer Chief 1-800-231-6292 <a href="mailto:ttd@dodded.mil">ttd@dodded.mil</a></p>
Source	<a href="http://www.proudtoserveagain.com">www.proudtoserveagain.com</a>

## Maturity Matters

Organization/ Program	Maturity Matters is managed by the <b>Tecumseh Area Partnership, Inc. (TAP, Inc.)</b> in Lafayette, IN.
Program Purpose	Maturity Matters is a special site that provides information and helpful resources related to mature adults.
Program Description	<p>Maturity Matters began in 2004 with a grant from the Retirement Research Foundation of Chicago. This initial grant funded three major research projects which analyzed Indiana businesses, lifelong learners, and educational institutions. The purpose of this research was to better understand who the mature workforce was, what their retirement intentions and challenges were, and what employment, entrepreneurial and volunteer opportunities they were interested in and skilled to do.</p> <p>In 2006, the program became part of the region's U.S. Department of Labor WIRED (Workforce Innovation for Regional Economic Development) initiative, administered through Purdue University, focusing on the mature and aging worker, aged 45 and up. Maturity Matters developed three components, which fall under its Lifelong Learning System:</p> <ol style="list-style-type: none"> <li>1) Four workshops targeted to businesses and HR professionals about the "3 R's" of the aging workforce dilemma: Recruitment, Retraining, and Retention.</li> <li>2) A Mature Worker analysis, targeted to businesses of 500 employees or less, focused on basic information such as the average age of the workforce, skills and talents, and offering suggestions on knowledge retention.</li> <li>3) Transition Workshops for mature workers who are within 3 years of retiring. These workshops will help individuals form a plan for their retirement, help them think through what they are going to do with the rest of their lives, and give advice about second careers based on high demand occupations in the region.</li> </ol> <p>The Lifelong Learning System also includes a web-accessible database of learning opportunities targeted to development of needed regional skills.</p> <p>The intent of these projects is to increase educational and training attainment of mature workers and increase the number of employers that implement mature worker human capital best practices, thereby improving the overall economic well-being of individuals and the region at large. The program focuses on the employer, stressing the importance of retaining older workers, and training and hiring retirees.</p>
Progress	Maturity Matters has been working with CAEL to develop a business plan for sustainability. The three components listed above are offered on a fee-for-service basis.
Contact Information	<p>Susie Perkins  Strategic Initiatives/External Communication Coordinator  765-477-1710  <a href="mailto:sparkins@tap.lafayette.in.us">sparkins@tap.lafayette.in.us</a></p>
Source	<a href="http://www.maturitymatters.org">www.maturitymatters.org</a> and conversation with Susie Perkins

## Senior Community Service Employment Program—Experience Works Model

Organization/ Program	<b>Experience Works</b> is one of 18 nonprofit organizations that offer the <b>Senior Community Service Employment Program (SCSEP)</b> .
Program Purpose	Experience Works helps seniors get the training they need to find good jobs by providing job placement, training, and community service for low-income older people. The organization is dedicated to breaking down the barriers to employment older people face, finding ways to encourage older people to work, and showing employers the value of hiring seniors.
Program Description	<p>Through the SCSEP program, Experience Works reaches out to seniors most in need, provides computer and basic skills training, provides job search skills, builds older workers' confidence, and increases services of local community service organizations. Those who are 55+ and low-income are assigned to agencies where they perform community service and receive training for an average of 20 hours/week and are paid the minimum wage.</p> <p>Experience Works also provides the following training:</p> <ul style="list-style-type: none"> <li>• Information technology training for low-income seniors ranging from basic computer skills to advanced certification courses.</li> <li>• Occupational skills training focused on developing skills in high-growth sectors such as the health care industry.</li> <li>• On-the-job-training where employers train participants for specific jobs that require special skills.</li> <li>• Flexible and customized training accessible to those with limited education, lack of transportation, scheduling difficulties, or disabilities. Basic computer literacy training is required for those taking part in older-worker customized job training.</li> </ul> <p>Experience Works provides the following additional programs:</p> <ul style="list-style-type: none"> <li>• <i>JobReady</i>: An online system for job seekers that helps identify the types of jobs for which they are best suited, as well as online courses in skill areas where additional training may be needed.</li> <li>• <i>Job Club</i>: Prepares older job seekers to find and keep a job through self-exploration, networking, and communications skills. This helps participants develop an effective and productive job search plan, provides instructional resources that support and contribute to the older job seekers' employment goals, and provides a network of mutual support for older job seekers.</li> <li>• The Employee Assistance Program, initiated in collaboration with the Small Business Administration in 2003, matches disadvantaged older workers with jobs at small businesses. Business Liaisons identify businesses with labor shortages and demonstrate to owners how older workers could meet their needs.</li> </ul>
Progress	Experience Works has demonstrated, through hundreds of stories of successful older workers, that an ageless workforce is possible. In 2007, over 17,000 participants nationally provided nearly 10 million hours of community services through SCSEP. In the last ten years, more than 55,600 low-income seniors found permanent employment through Experience Works. The organization serves more than 50,000 people each year, has more than 300 employees, and operates in 30 states and Puerto Rico.
Contact Information	Lita Levine Kleger, Vice President of External Affairs 1-800-397-9757 or 703-522-7272
Source	<a href="http://www.experienceworks.org">www.experienceworks.org</a> and conversation with Lita Levine Kleger

## Boomerang Program

Organization/Program	Also referred to as the <b>State of California Retirees Job Connection</b> , this program is managed by the State Personnel Board.
Program Purpose	The program connects former California state employees with part-time, temporary work assignments in state agencies, and provides state agencies with ready access to experienced workers to fill temporary hiring needs.
Program Description	<p>The Boomerang program is a centralized database that contains the names and relevant experience, skills and abilities of former state employees who have expressed an interest in obtaining work during retirement. The program saves time and effort in locating qualified candidates that can meet employment needs and provides state departments with 24/7 access to a pool of potential applicants.</p> <p>Hiring supervisors can identify job matches by browsing information sorted by the retiree’s classification and job title prior to retirement, skills he/she has identified, and employment preferences (i.e. work days, hours, location). Because retiree skills and experience are self-identified, it is the responsibility of the hiring supervisor to verify the individual’s qualifications.</p> <p>State departments post these job opportunities on the State Personnel Board’s website at <a href="http://www.spb.ca.gov">www.spb.ca.gov</a>. Retirees may choose to browse retired annuitant opportunities on the website or wait until they are contacted by a hiring department using the Boomerang program. A retired annuitant may work for any state department, either concurrently or at different times.</p> <p>Retired annuitants are allowed to work a maximum of 960 hours per fiscal year (July-June). This maximum applies to the individual, not the job. The minimum number of hours a retired annuitant can work is based on individual preference and availability. A retired annuitant appointment is a temporary, paid position and does not entitle the retiree to receive any additional benefits. A retired annuitant does not qualify to earn vacation, sick leave or other types of leave credits.</p> <p>There is currently no charge to participating departments.</p>
Progress	The Boomerang program has been running since September 2007. There are currently 2826 registered retirees and 74 departments utilizing the program.
Contact Information	Christina Padilla Perez State Personnel Board Administrator 916-653-1020 <a href="mailto:Boomerang@spb.ca.gov">Boomerang@spb.ca.gov</a>
Source	<a href="http://www.boomerang.ca.gov">www.boomerang.ca.gov</a> and email exchange with Christina Padilla Perez

## Golden Opportunities for Lifelong Development (GOLD) Program

Organization/Program	The GOLD program is administered by the <b>New Mexico Aging &amp; Long Term Services Department</b> .
Program Purpose	The GOLD Program provides intergenerational mentoring services, by individuals 50 and older, to at-risk individuals entering or re-entering the workforce, as well as others who may be experiencing barriers to employment.
Program Description	<p>The GOLD Program hires persons aged 50 and older to mentor at-risk persons statewide. Individuals mentored primarily include Temporary Assistance to Needy Families (TANF) recipients, high school students with disabilities, and youth graduating out of foster care.</p> <p>Mentors provide support to help individuals and families become more self-sufficient. Mentoring support is based on individual client needs and may include activities such as resume development, interview preparation, and accompanying clients to court, as well as referrals to community resources for alcoholism, substance abuse, etc.</p> <p>This program is designed to appeal to retiring baby boomers who are looking for flexible, part-time work to supplement their incomes and who wish, at the same time, to give back to their communities. There are no income guidelines for participation, but participants must be 50 and older. Mentors receive a wage, not a stipend, of \$10 an hour and work around 20 hours per week. Mentors do not receive benefits, except for sick and vacation leave.</p> <p>Funding for the GOLD Program comes from federal TANF funds that are allocated through the state legislature.</p>
Progress	The GOLD Program started in 2000 and was modeled after a welfare program in Kansas. 11 programs are currently running across the state of New Mexico and over 6000 clients have been mentored through the program to date.
Contact Information	<p>Sondra Match            GOLD Program Manager            505-474-3800, ext. 1007  <a href="mailto:sondra.match@state.nm.us">sondra.match@state.nm.us</a></p>
Source	<a href="http://www.nmaging.state.nm.us/Senior_Employment.html">http://www.nmaging.state.nm.us/Senior_Employment.html</a> and conversation with Sondra Match

## Business Outreach Liaison Development (BOLD) Program

Organization/Program	The BOLD program was administered by the <b>New Mexico Aging &amp; Long Term Services Department</b> .
Program Purpose	The BOLD Program provided supportive liaison services to business and industry to facilitate the use of One-Stop Employment Centers, as well as the employment of older businesspersons.
Program Description	<p>The BOLD Program hired retired and semi-retired business people, aged 50 and older, to connect businesses in their local areas with services available through One-Stop Employment Centers.</p> <p>In particular, BOLD participants provided face-to-face outreach to businesses, talked with them about their employment needs, encouraged them to sign up for the On the Job Training Program, and connected them with other One-Stop services to meet their training and hiring needs.</p> <p>This program was designed to appeal to retiring baby boomers who were looking for flexible, part-time work to supplement their incomes and who also wished to give back to their communities. There were no income guidelines for participation, but participants had to be 50 and older. Participants received a wage, not a stipend, between \$14 and \$15 an hour. On average, participants worked 30–35 hours per week. Benefits were not included, except for sick and vacation leave.</p>
Progress	Funding for the BOLD Program came from contracts with local workforce boards throughout the state. <b>The program is no longer in operation.</b> During the time of operation, the BOLD Program employed around a dozen workers aged 50 and older.
Contact Information	Sondra Match 505-474-3800, ext. 1007 <a href="mailto:sondra.match@state.nm.us">sondra.match@state.nm.us</a>
Source	<a href="http://www.nmaging.state.nm.us/Senior_Employment.html">http://www.nmaging.state.nm.us/Senior_Employment.html</a> and conversation with Sondra Match

## FedExperience Transitions to Government

Organization/ Program	This initiative was developed by <b>Partnership for Public Service (Partnership)</b> .
Program Purpose	FedExperience is a program used by federal agencies, corporate partners, and other stakeholders to match government's critical hiring needs with the talents of experienced older workers.
Program Description	<p>The Partnership, with support from AARP, Civic Ventures, and other advocacy groups, is working with IBM as the major corporate talent source. The program identifies, recruits, and successfully hires interested IBM employees and retirees for key jobs in the federal government.</p> <p>The first agency partner in this program is the U.S. Department of the Treasury, which has significant mission-critical hiring needs that overlap with the skill sets of IBM employees. Based on lessons learned from this initial effort, the Partnership will expand its pilot to other companies and agencies.</p> <p>The program is being funded in large part via a grant from The Atlantic Philanthropies, in addition to funds provided by the Partnership, IBM, and the Treasury.</p> <p>The project has been in the idea stage since 2006. In looking at nationwide workforce demographics it became apparent that over a half million experienced and highly skilled employees would be leaving their federal jobs by the end of 2010—most via retirements. This looming brain drain called for new talent acquisition strategies in addition to more entry level employees (e.g., recent college graduates) and grooming current federal workers to take on jobs with greater responsibility. Based on front end research, the Partnership identified the growing baby boomer population as a potential prime talent source since many retirees from the private, nonprofit, military and other sectors possess the skills and experience that the federal government will need as its aging workforce retires.</p> <p>The Partnership makes sure that specific Treasury job opportunities are sent to IBM employees with matching skill sets and experience; helps to create streamlined hiring processes; provides career transition support, such as employee benefits counseling and networking events; encourages flexible work arrangements; and helps establish mentoring programs and other employee-friendly practices.</p> <p>The federal government offers many benefits of interest to older workers, including flexible work schedules, job sharing, increased vacation time for experienced new hires, and teleworking arrangements.</p>
Progress	The FedExperience pilot launched on August 8, 2008. Initial indications show a great deal of interest among IBM employees and retirees in exploring potential second careers in public service. There is enthusiasm within the Department of the Treasury about being able to target key talent needs to IBM's large reservoir of experienced workers and retirees.
Contact Information	<p>Tim Dirks Senior Consultant 202-775-9111 <a href="mailto:tdirks@ourpublicservice.org">tdirks@ourpublicservice.org</a></p>
Source	<a href="http://www.ourpublicservice.org/OPS/programs/fedexperience/">http://www.ourpublicservice.org/OPS/programs/fedexperience/</a> and conversation with Tim Dirks

## Senior Environmental Employment Program

Organization/Program	The Senior Environmental Employment (SEE) program is offered by the <b>U.S. Environmental Protection Agency (EPA)</b> . Various grantees run the program across the country.
Program Purpose	The SEE program provides an opportunity for retired and unemployed individuals aged 55 and over to share their expertise with the EPA. The goal of the program is to support environmental projects and give older workers an opportunity to remain active while using skills and knowledge obtained during their working careers.
Program Description	<p>To implement this program, the EPA and other federal and state environmental offices fund cooperative agreements with national aging organizations that have been authorized by the Secretary of Labor. These organizations recruit qualified candidates to work in positions in Washington, DC, laboratories nationwide and in regional offices.</p> <p>The SEE program offers administrative support, technical support, and professional positions nationwide. Types of SEE program enrollment positions include:</p> <ul style="list-style-type: none"> <li>• Clerical (non-typing)—such as messenger, receptionist, file clerk, and copy machine operator;</li> <li>• Clerical (typing)—such as clerk-typist, secretarial support, and administrative assistant;</li> <li>• Technical—such as physical science technician, grant specialist, writer-editor, technical researcher, and technical writer;</li> <li>• Professional—such as engineer, scientist and accountant.</li> </ul> <p>SEE workers are not federal employees or employees of the grantee organization, they are SEE program enrollees.</p> <p>Positions are full-time or part-time with benefits, including accrued vacation, sick leave, paid holidays, and medical insurance. Salaries, benefits, vacation and sick leave, and any personnel actions or issues are administered by the grantee organization. Productivity is monitored by a federal employee.</p>
Progress	The SEE program has been providing individuals 55 years or older an opportunity to be engaged in work with the EPA since 1984.
Contact Information	SEE Program U.S. Environmental Protection Agency 202-564-0420
Source	<a href="http://www.epa.gov">www.epa.gov</a>

## Providing Entrepreneurship Programs for Mature Workers

### Project GATE

Organization/ Program	Growing America Through Entrepreneurship (Project GATE)
Program Purpose	The U.S. Department of Labor (USDOL) has developed this innovative demonstration project with the U.S. Small Business Administration to help emerging entrepreneurs in rural and urban communities achieve the American dream of owning their own business.
Program Description	<p>Project GATE provides training, technical assistance and assistance in applying for small business loans to individuals who are interested in starting and/or growing a small business. The GATE demonstration project was originally implemented at seven sites in three states: Maine, Pennsylvania, and Minnesota. This project leverages existing initiatives into one easy-to-access and comprehensive program. USDOL One-Stop Centers serve as the delivery mechanism for Project GATE.</p> <p>A second round of Project GATE pilots was launched that focuses efforts on the mature worker population. Project GATE II pilots include:</p> <p><b>Virginia Community College, NOVA GATE.</b> This collaborative effort focuses on services to dislocated workers age 50 and over that are eligible for WIA services. The NOVA GATE project will assess up to 225 dislocated workers and enable 188 eligible candidates to obtain information, classroom training, one-to-one technical assistance, counseling, guidance and financial assistance (low-interest loans) so they can establish new businesses, as well as start and sustain successful self-employment. The geographic area served consists of the following counties: Counties of Fairfax, Loudoun and Prince William, including the cities of Fairfax, Falls Church, Manassas and Manassas Park. For more information, contact Kathy Thompson: 804-371-2649.</p> <p><b>Minnesota Department of Employment and Economic Development.</b> This demonstration project will provide entrepreneurship opportunities for dislocated workers fifty years and over who are eligible for WIA services. The project will use a ten step approach for its participants: eligibility filtering, career goal discussion, registration, entrepreneurship orientation, application, rigorous assessment, training, counseling, resources and support, and finally success (including outcome measurement). The geographic area covered includes: Nine Small Business Development Centers in Minnesota - Bemidji, Brainerd, Duluth, Mankato, Marshall, Minneapolis, Moorehead, Rochester, and Saint Cloud. For more information, contact Anthony Albert Alongi: 651-259-7528.</p>
Progress	Project GATE II was implemented in June 2008 and will run through June 2011.
Contact Information	Jonathan Simonetta U.S. Department of Labor Employment and Training Administration 202-693-3911
Source	<a href="http://www.doleta.gov/projectgate/">www.doleta.gov/projectgate/</a> and email exchange with Jonathan Simonetta

# Offering Advice, Networking Events, Resources and Services to Mature Workers

## Gateway Community College, Center for Workforce Transition

Organization/ Program	The Center for Workforce Transition is a program of <b>Gateway Community College</b> in Phoenix, AZ.
Program Purpose	The Center for Workforce Transition works simultaneously with employers and mature workers to encourage workforce innovation and facilitate meaningful work experiences for both boomers and employers.
Program Description	<p>To address the changing workforce, the Center provides resources for older workers and their employers through <a href="http://www.boomersindemand.com">www.boomersindemand.com</a>, as well as through onsite services, events, trainings and workshops. Employees and employers are provided assistance in three distinct areas: assessment, training, and through the work exchange.</p> <p><b>Services for Boomers.</b> The Center helps boomers re-purpose their work and retirement priorities, discover talents and abilities, and retool for new work opportunities. Sample services include:</p> <ul style="list-style-type: none"> <li>• Assessment: Tools are provided to help workers assess interests and values, identify transferable skills and experiences, make informed decisions, and develop job proposals and resumes.</li> <li>• Training: Boomers are linked to short-term and ongoing training resources. These resources currently include areas in Education, Social Services and Healthcare, as well as workshops for mature workers. In particular, the Caregiver Career Development &amp; Placement Program is recognized as an innovative and creative concept designed to face the growing healthcare worker shortage and help mature workers re-career in the healthcare profession.</li> <li>• Work Exchange: Boomers post resumes and search for jobs and internships through a partnership with <a href="http://Jobing.com">Jobing.com</a>.</li> <li>• Other services include boomer events or job fairs held every six weeks, and <b>Boomer Speed Dating</b> events where workers network with employers, learn about career opportunities, and obtain information in a structured setting. Roving reporters also interview mature workers to better understand their needs. A calendar of events is located at <a href="http://www.boomersindemand.com">www.boomersindemand.com</a>.</li> </ul> <p><b>Services for Employers.</b> The Center helps employers utilize the talent of the mature workforce to help meet the challenges of the twenty-first century work world. Sample services include:</p> <ul style="list-style-type: none"> <li>• Assessment: Limited tools are available to help employers assess their workforce needs. Additional tools are being developed.</li> <li>• Training: Employers participate in workshops and trainings on thinking through the new world of work, using flexibility as a business strategy, transition services, and customer service. Employers are assigned a mentor to provide additional resources.</li> <li>• Work Exchange: Through <a href="http://Jobing.com">Jobing.com</a>, employers are able to post open positions and review resumes of mature workers.</li> <li>• Employers learn about boomer job fairs and Employer Summits.</li> </ul>
Progress	The Center first received funding in September of 2007 and programs have been offered since May of 2008. New trainings, workshops, events, and online services continue to be added as the Center grows.
Contact Information	Jan Davie Director of Career & Employment Services <a href="mailto:davie@gatewaycc.edu">davie@gatewaycc.edu</a>
Source	<a href="http://www.boomersindemand.com">www.boomersindemand.com</a> and conversation with Jan Davie

## Jewish Family and Vocational Service—Boomer Expo

Organization/Program	Boomer Expos are hosted by <b>Jewish Family and Vocational Service (JFVS)</b> in Louisville, KY.
Program Purpose	Boomer Expos provide a forum for older adults to meet with experts and learn about a variety of options and services relevant now and as they age.
Program Description	<p>Exhibitors provide information on topics such as career choices after 50, financial planning, healthcare, legal issues, and more. The Expo also attracts employers who are interested in gaining access to the mature workforce, providing an interface between potential employees and employers.</p> <p>During the first Boomer Expo, a variety of workshops were available to participants to offer in-depth information on key issues facing boomers. Two workshops were targeted towards participants who intend to keep working and earning during traditional retirement years:</p> <ul style="list-style-type: none"> <li>• JFVS and AARP Kentucky teamed up to offer <i>The Changing Workforce through Employers' Eyes</i> to give attendees an inside look at what their workforce choices might be during this new stage of life.</li> <li>• JFVS counselors hosted <i>Planning Your Retirement Lifestyle</i> to offer suggestions and guidance on work and leisure decisions after traditional retirement.</li> </ul> <p>Other workshops included topics such as <i>Financial Planning for Retirement</i>, presented by Morgan Stanley, and <i>Trading Places: When Children Become Their Parents' Caregivers</i>, conducted by JFVS counselors.</p> <p>In addition to an expanded offering of workshops and exhibitors, the second Boomer Expo featured Marc Freedman as the luncheon speaker. Freedman is the founder and CEO of Civic Ventures, and is one of the nation's leading thinkers and writers on opportunities presented by the aging of America.</p>
Progress	The first Boomer Expo was held in 2007 and the second Boomer Expo was held in October 2008. The Expo attracts between 50-100 exhibitors and between 200-350 participants.
Contact Information	Mauri Malka 502-452-6341, ext. 250
Source	<a href="http://www.jfvs.com">www.jfvs.com</a> and conversation with Bob Tiell

## Idealist.org Mid-Career Transitions Resource Center

Organization/ Program	A special section of the web resource is dedicated to <b>Experienced Professionals and Encore Careerists</b> .
Program Purpose	The Idealist.org Mid-Career Transitions Resource Center (MCTRC) supports job seekers, and the career development professionals who counsel them, by providing online and real-world resources to help individuals conduct a nonprofit job search.
Program Description	<p>This resource center is primarily designed to assist individuals in finding nonprofit jobs during career transition periods. The MCTRC also links with strategic partners in the nonprofit, for-profit, and government sectors to train hiring professionals on the benefits of recruiting, training, and employing the mid-career workforce.</p> <p>The MCTRC supports mid-career professionals coming from a variety of backgrounds, but the most established work to date is with the aging workforce and the baby boomer demographic.</p> <p>There is a specific page on this website dedicated to experienced professionals and encore careerists. The website links experienced workers to resources that help them discover how to realistically and successfully get involved in the nonprofit sector.</p> <p>Sample resources and links include: AARP, American Bar Association, Commission on the Second Season of Service, Bloom Anew, Bridgestar, Civic Ventures, Coming of Age, Halftime, National Council on Aging, National Retired Teachers Association, and ReServe.</p> <p>Individuals can also join local Idealist networking and support groups that bring together mid-career job seekers, career professionals, and organizations for the purpose of sharing resources, ideas, and connections.</p> <p>The MCTRC also provides online access to the Idealist Guide to Nonprofit Careers for Sector Switchers, a free resource for transitioning professionals pursuing new career options in the nonprofit sector.</p>
Progress	The MCTRC was “soft-launched” in the Spring of 2008 and will be revised and re-launched during the next year.
Contact Information	<p>Steve Pascal-Joiner            Career Transitions Program Manager  <a href="mailto:steven@idealist.org">steven@idealist.org</a>            503-227-0803 ext 113</p>
Source	<a href="http://www.idealists.org">www.idealists.org</a> and conversation with Steve Pascal-Joiner

## Retired Brains®

Organization/Program	Retired Brains' website is managed by <b>Retired Brains LLC</b> .
Program Purpose	This website connects older workers with employers seeking to hire them. This site provides senior-focused material including information on health concerns, insurance products, cruises and vacations, financial planning, retirement living and much more.
Program Description	<p>The Retired Brains website is available to anyone, but is geared toward the retired workers, older boomers, those about to retire, and seniors. The website requires individuals to open a free member account, providing an email address and password. Individuals may post a resume, search for available jobs, research key industries and build their portfolio. The resource also offers help with resume writing, retirement planning, career consultation, and continuing education and training.</p> <p>Employers interested in hiring mature workers pay a fee of \$150 to post a position announcement on the website for 60 days. Employers can also pay a fee to search the retiree resume database. The website also includes a list of featured employers interested in employing retired workers.</p>
Progress	The website was started as a job board by Arthur Koff in 2003. In 2004, Koff decided to increase the content of the website and offer additional information to retired workers, to increase the return rate of visitors to the site. Today the site is going strong, with dramatic increases in traffic.
Contact Information	<p>Arthur Koff            Founder            312-787-6611  <a href="mailto:artkoff@rcn.com">artkoff@rcn.com</a></p>
Source	<a href="http://www.retiredbrains.com">www.retiredbrains.com</a> and conversation with Arthur Koff

## Lifelong Learning Accounts

Organization/ Program	Lifelong Learning Accounts (LiLAs) were developed, piloted and advocated by the <b>Council for Adult and Experiential Learning (CAEL)</b> .
Program Purpose	LiLAs are employer-matched, employee-owned individual educational accounts used to finance workers' education and training. The vision is for all workers to contribute to LiLA accounts and have that contribution matched by their employers—much like a 401(k), but for education and training. LiLA contributions can also be matched by third parties, including philanthropic, federal, state, and local government resources. CAEL's goal is to make LiLAs available to all working adults as a part of basic compensation packages.
Program Description	<p>CAEL's LiLA model has the following features:</p> <ul style="list-style-type: none"> <li>• <b>Universal Eligibility:</b> All individual workers are eligible for accounts.</li> <li>• <b>Broad Use of Funds:</b> Eligible expenses include tuition and fees, supplies, materials, and books. Allowable educational activities include, but are not limited to, studies related to a worker's job or industry.</li> <li>• <b>Portability:</b> As LiLAs scale up, funds stay with the individual, regardless of the person's current employer or employment status.</li> <li>• <b>Voluntary Participation:</b> Individuals and employers have the option of participating.</li> <li>• <b>Matched Funding:</b> LiLA accounts are funded through individual contributions, employer matches, and potentially third party funds. The third party funds can be in the form of foundation grants, public sector funding, and federal or state tax credits.</li> <li>• <b>Informed Choice:</b> Individual participants choose the training and education they need to meet their career goals that are grounded in a learning plan developed with career and education advisors.</li> </ul>
Progress	<p>CAEL has just completed a successful five-year, three-site, multi-sector LiLA demonstration in Chicago, Northeast Indiana and San Francisco and is now launching new pilot programs across the country, including a program in the Bay Area targeting lower-income workers 55 and older.</p> <p>CAEL's policy initiative is designed to encourage national and state leaders to adopt LiLAs and support policy for their use. As a result of this work, there is increasingly strong interest on Capitol Hill. Representatives Emanuel (D-IL) and Ramstad (R-MN) recently introduced the Lifelong Learning Accounts Act of 2008 (HR 6036) to make employee and employer tax credits available for account contributions.</p> <p>CAEL is also working closely with states' leaders across the country to advance LiLAs. LiLA activities have been explored, or are currently underway, in the following states: California, Hawaii, Illinois, Indiana, Iowa, Maine, Massachusetts, Michigan, Minnesota, Missouri/Kansas, New York, Pennsylvania and Washington.</p>
Contact Information	<p>Amy Sherman Associate Vice President for Policy and Strategic Alliances 312-499-2635 <a href="mailto:asherma@cael.org">asherma@cael.org</a></p>
Source	Council for Adult and Experiential Learning ( <a href="http://www.cael.org">www.cael.org</a> )

## Coming of Age

Organization/Program	The <i>Coming of Age</i> initiative is a partnership of the <b>Center for Intergenerational Learning (CIL) at Temple University, PBS/NPR station WHYI, AARP Pennsylvania and the United Way of Southeastern Pennsylvania.</b>
Program Purpose	This program is designed to reinvent retirement by inspiring baby boomers and others 50+ to explore their futures, to connect and contribute to the community and strengthen the capacity of nonprofit organizations to identify and provide meaningful opportunities for people 50+.
Program Description	<p><i>Coming of Age</i> provides resources that help people 50 and over prepare for the future, make a difference in the community, plan for work in retirement, and pursue learning opportunities during this new stage of life.</p> <p>The <i>Coming of Age</i> website offers a variety of self-exploration and transition resources, job and volunteer search tools, a learning opportunity search engine, and research and articles spotlighting the nonprofit world. The website also includes transition stories and real life examples from people 50+ who decided to go back to school, start a new career, and/or return to a long-postponed passion.</p> <p>In addition to resources for individuals, <i>Coming of Age</i> provides a variety of trainings and other resources for nonprofit organizations. A few of the key programs include:</p> <ul style="list-style-type: none"> <li>• <b>Coming of Age Learning Labs:</b> A series of workshops to help nonprofits create opportunities to attract and retain people aged 50 and older.</li> <li>• <b>Capturing Experience:</b> A free, online interactive course that provides organizations with proven strategies to capture the talent, energy, and experience of people 50 and over. The course includes ideas for recruiting, placing, retaining and supporting people 50+, as well as information on older adults, what they want, and how to develop appealing opportunities for this population.</li> </ul>
Progress	<i>Coming of Age</i> presently offers resources to people 50 and over and nonprofits in five Philadelphia-area counties. As part of its national replication, 25 other communities have presented or are planning to present <i>Coming of Age</i> Learning Labs and other programs.
Contact Information	Dick Goldberg Director, <i>Coming of Age</i> 215-204-8585 <a href="mailto:DGGoldberg@ComingofAge.org">DGGoldberg@ComingofAge.org</a>
Source	<a href="http://www.comingofage.org">www.comingofage.org</a> and phone/email conversations with Dick Goldberg and Nancy Henkin

## Life By Design Northwest

Organization/ Program	<p><b>Life By Design Northwest</b> is a partnership of the following organizations:</p> <ul style="list-style-type: none"> <li>• AARP Oregon</li> <li>• Express Personnel Services</li> <li>• Hands On Portland</li> <li>• Morrison Child and Family Services</li> <li>• Multnomah County Library</li> <li>• NW Natural</li> <li>• Oregon Public Broadcasting</li> <li>• Portland Community College</li> <li>• Portland State University</li> <li>• The governing body of Life by Design Northwest is its Leadership Council.</li> </ul>
Program Purpose	<p>The mission of Life by Design Northwest is to support people, as they age, in discovering their passion and purpose so they engage their wisdom and skills to strengthen the community and achieve personal fulfillment.</p>
Program Description	<p>The idea for Life by Design Northwest began in 2003, through focus groups and testing of assessment materials. Key leaders in Oregon found there wasn't an umbrella organization targeted to mature workers about to retire. Funded through grants, with major support from The Atlantic Philanthropies, today Life by Design Northwest is a unique system created to meet the needs of baby boomers, connecting people to resources throughout the state. The organization launched in September 2007.</p> <p>Life by Design Northwest offers workshops that take a comprehensive approach to retirement planning. Each workshop leads employees through a process of making personal discoveries, designing achievable plans, and exploring opportunities for meaningful engagement in the next phase of life.</p>
Progress	<p>Over the past year, Life by Design Northwest has supported people contemplating retirement and older adults by providing opportunities for in-depth assessment and life planning, lifelong learning and civic engagement. Life by Design Northwest is currently offering a series of employee workshops that employers can make available as an added benefit at a small cost per individual.</p> <p>Life by Design Northwest targets the individual, and collaborates with Portland Community College's Workforce Training Centers to address the needs of both the employer and the individual. However, as a second phase of this development, Life by Design Northwest will be setting up learning organizations and working with employers to change their company policies and procedures affecting mature workers.</p> <p>Life by Design Northwest recently collaborated with the Women's Bureau of the United States Department of Labor to develop a resource called Flexible Work Options for Mature Workers. This resource will be available in March 2009.</p>
Contact Information	<p>Karen Shimada, MPH            Program Manager            503-731-6650  <a href="mailto:kshimada@lifebydesignnw.org">kshimada@lifebydesignnw.org</a></p>
Source	<p><a href="http://www.lifebydesignnw.org">www.lifebydesignnw.org</a> and conversation with Karen Shimada</p>

## Mature Worker Connection

Organization/Program	The Mature Worker Connection is a program of the <b>Pima Council on Aging</b> .
Program Purpose	The purposes of the program are to increase employment opportunities for workers aged 50+ and to educate employers about the benefits and advantages of a more mature workforce.
Program Description	<p>Mature Worker Connection (MWC) is an innovative, free job placement service for people over 50.</p> <p>MWC promotes the experience, skills, reliability, commitment to socially meaningful work, and enthusiasm of employees aged 50 and older. A wide variety of nonprofit employers have listed jobs with MWC, including Pima Community College, the University of Arizona, a clinic for people with AIDS, Habitat for Humanity, elder care organizations, and many more small nonprofits. To attract more job listings in this sector, MWC is working with groups like the Arizona Alliance of Nonprofits.</p> <p>MWC is one of the key partners in the Arizona Mature Workforce Initiative.</p>
Progress	<p>In January 2006, MWC opened with a special emphasis on serving women, minorities, and low-income adults. Already discussions are underway to expand, reach more women and inner city residents, develop more partnerships with employers and service providers, and create mature worker job clubs.</p> <p>Mature Worker Connection has registered 196 employers (76 are nonprofit/public sector employers) and placed 201 people (67 workers in nonprofit/public sector jobs).</p>
Contact Information	<p>Roger Forrester  Mature Worker Connection  520-623-3304  <a href="mailto:rforrester@pcoa.org">rforrester@pcoa.org</a></p>
Source	<a href="http://www.matureworkerconnection.org">www.matureworkerconnection.org</a> and conversation with Melanie Starns

## *Encouraging Postsecondary Institutions and Other Education and Training Providers to Offer Specialized Training and Other Services that Address the Needs of Mature Workers*

### **Peer Mentoring Program**

Organization/Program	The Peer Mentoring Program is one of several mature worker offerings of <b>Portland Community College (PCC)</b> .
Program Purpose	The purpose is to provide support to older students (age 50 and older) in transitioning into college life and into careers.
Program Description	<p>Through an Encore Career Grant from Civic Ventures, PCC developed a pilot peer mentorship program to provide students aged 50+ with individualized support. Peer mentors assisted the Gerontology Program faculty and advisors in guiding students through the Program's Career Management Model—from program entry, personal assessment and career exploration, through completion of general education and core program courses, involvement in intentional internships and preparation for employment.</p> <p>The peer mentors assist students in navigating the college system, provide assistance with registration, help in course planning, and provide general academic and social support. The program builds upon PCC's leadership in addressing the needs of students aged 50 and older.</p>
Progress	The Peer Mentoring Program has used eight peer mentors to help adult students transition to college life, focusing on learning issues, balancing life/work/school, connecting students to resources, providing support for job readiness, job placement, one-on-one advising, and providing navigational assistance. Currently the program uses 4 or 5 mentors and is still up and running.
Contact Information	<p>Dr. Jan Abushakrah  Portland Community College  Gerontology Program  <a href="mailto:jabushak@pcc.edu">jabushak@pcc.edu</a></p>
Source	<a href="http://www.civicventures.org/communitycolleges/investing.cfm#pcc">http://www.civicventures.org/communitycolleges/investing.cfm#pcc</a> and conversation with Jan Abushakrah

Please note that profiles for additional programs at Portland Community College are located in Appendix B on pages 49 and 50.

### **Gateway Community College, Center for Workforce Transition**

Please see profile of Gateway Community College on page 39.

## Prior Learning Assessment (PLA) Program

Organization/Program	Prior Learning Assessment (PLA) is offered by colleges and universities across the country. PLA can be offered through exams, evaluation of corporate training, challenge exams, and portfolio assessment. This profile is of the PLA program offered by <b>Marylhurst University</b> .
Program Purpose	Through Marylhurst University's PLA Program, life and work experiences such as employment, homemaking, company-sponsored or military training, community service, independent research and travel study may apply as credit toward an undergraduate degree.
Program Description	<p>Each aspect of the educational experience at Marylhurst University is designed to meet the needs of today's adult student. The PLA Program at Marylhurst University makes it even easier for mature learners to pursue an undergraduate degree. The program is developed for and targeted to older students, and has attracted large numbers of transfer students to the university.</p> <p>Through the PLA program, students can earn a maximum of 45 credits toward a bachelor's degree. Development of an individual education plan begins in the Learning Assessment Workshop, the first of three required PLA courses. Students must first take the required course in part to ensure that they have the appropriate depth and breadth of knowledge, to clarify education goals, develop a personal plan, and discover how many credits can be earned for prior learning.</p> <p>What makes this PLA program unique are the individualized advising and support systems in place. The PLA program is a series of courses, and in those courses students learn how to do PLA submissions, and they also learn about experiential learning theory, academic writing and research, etc. Additionally, from a policy perspective, students can do PLA for any course from any regionally accredited college or university offered within the last 5 years. In other words, they are not restricted to Marylhurst course offerings.</p> <p>With a combination of PLA and the ability to transfer to a private college, students can begin their degree at a community college, and complete it at Marylhurst University, saving time and money. Marylhurst serves adult learners specifically, so most of their students are older students, and most have community college credits.</p>
Progress	Marylhurst's PLA program has helped attract adult students. Many students at the university begin with a PLA Informational Meeting or the LRN 150 course, even if they do not continue in the PLA program.
Contact Information	<p>Melanie Booth, Ed.D.            Director, Learning Assessment Center &amp; Prior Learning Assessment Program            503-636-3941  <a href="mailto:mbooth@marylhurst.edu">mbooth@marylhurst.edu</a></p>
Source	<a href="http://www.marylhurst.edu/learningassessment/plaprogram.php">http://www.marylhurst.edu/learningassessment/plaprogram.php</a> and conversation with Melanie Booth

## Short-Term Certificates of Completion

Organization/Program	Short-term certificates of completion are offered by <b>Portland Community College (PCC)</b> .
Program Purpose	The Gerontology Department at PCC developed job-focused Short-Term Certificates of Completion for adults as a way to get into jobs while they continue working on a gerontology degree.
Program Description	These short-term, job-related certificates include courses required for the one year certificate and AAS degree, so students can achieve a milestone that enables them to find immediate employment, while continuing to advance toward the AAS degree, which in turn can articulate with a Bachelor level degree.
Progress	<p>As a result of the Short Term Certificates of Completion, PCC's Gerontology Program has seen burgeoning growth. In the last four months alone, an average of 12 new students per month have enrolled in the program, making a total of 180 students. These students are working on either a degree or short-term certificate. The Short-Term Certificates have made the Gerontology Program the entry point for many adult students.</p> <p>Short-term, job-related certificate programs could be adapted to specifically target the training and employment needs of the mature workforce.</p>
Contact Information	<p>Dr. Jan Abushakrah  Portland Community College  Gerontology Program  503-977-4077  <a href="mailto:jabushak@pcc.edu">jabushak@pcc.edu</a></p>
Source	<a href="http://www.pcc.edu/programs/gerontology">www.pcc.edu/programs/gerontology</a> and conversation with Jan Abushakrah

Please note that profiles for additional programs at Portland Community College are located in Appendix B on pages 47 and 50.

## *Encouraging Employers to Adopt New Practices that Facilitate the Learning and Careers of Mature Workers*

### **Customized and Workplace Training**

Organization/Program	Customized and Workplace Training is offered by <b>Portland Community College (PCC)</b> .
Program Purpose	The purpose of this program is to help businesses identify challenges related to an aging workforce and impending vacancies created by retirement.
Program Description	<p>Customized &amp; Workplace Training (CWT) at Portland Community College is a premier provider of customized training and development solutions for business, industry, and government worldwide. As part of its core competencies, CWT develops customized training and development solutions that help employers maximize profitability and sustainability.</p> <p>Recently CWT developed a Suite of Offerings to address mature workers and the issue of the retiring workforce. This Suite of Offerings for businesses is focused on providing an understanding of the impact on their business and workforce as many of their workers retire. CWT will work with the business to develop and implement a strategy to mitigate the impact. CWT offers strategies designed to recruit older workers, retain older workers, and can provide consulting around managing a multi-generational workplace.</p>
Progress	<p>CWT has an agreement with Multnomah County, Oregon's largest county, which includes the City of Portland, to provide services to businesses within the county.</p> <p>In addition, CWT works in partnership with Life by Design Northwest to provide workshops for employers that are developing companywide strategies to incorporate mature workers into their workforce.</p>
Contact Information	<p>Paul Wild          Director          503-533-2893  <a href="mailto:pwild@pcc.edu">pwild@pcc.edu</a></p>
Source	<a href="http://www.pcc.edu/business/workplace-training">www.pcc.edu/business/workplace-training</a> and conversation with Paul Wild

*Please note that profiles for additional programs at Portland Community College are located in Appendix B on pages 47 and 49.*

## Leesburg Regional Medical Center and The Villages Regional Hospital

Organization/Program	Recruitment and retention strategies by <b>Leesburg Regional Medical Center and The Villages Regional Hospital (LRMC/TVRH)</b> .
Program Purpose	In order to serve the health care needs of the people of central Florida and to reduce the growing number of vacancies at the workplace, LRMC/TVRH, part of the Central Florida Health Alliance, embarked on a strategy to recruit and retain experienced, older hospital staff members.
Program Description	<p>To recruit mature workers and retirees, LRMC/TVRH uses placement agencies for older job-seekers and offers retirees temporary work assignments, consulting or contract work, telecommuting, pool status, and full- or part-time work. Perhaps the most important benefit to attracting and retaining older employees is flexibility. LRMC/TVRH offers a range of flexible work options, including five different shifts, from as few as four hours to as many as 12 hours each, plus a wide range of part-time and seasonal schedules. Some employees have summers off. Others who travel north in the summer work through fall and winter at the center. In addition, LRMC/TVRH offers benefits to part-time staff.</p> <p>Recruiting and retaining older staff members helps the medical center in two ways—it helps maintain quality of care by minimizing vacancies and turnover, and it helps meet the needs of older patients.</p>
Progress	<p>After a five-year effort to recruit and retain health care staff over 50, the medical center has reduced staff turnover dramatically, while cutting costs and medical errors, and ensuring quality care. The facility boasts vacancy rates of just 5 percent, a turnover rate for registered nurses of 6 percent, and an overall turnover rate of less than 10 percent. The numbers continue to drop.</p> <p>Since the decision five years ago to boost retention and recruitment of older employees, as LRMC/TVRH was opening a new hospital that needed to be staffed, it has increased the percentage of employees over 50 from 33 percent to 48 percent.</p>
Contact Information	<p>Darlene Stone            VP, Human Resources            352-323-5362  <a href="mailto:dstone@leesburgregional.com">dstone@leesburgregional.com</a></p>
Source	<a href="http://www.leesburgregional.org">www.leesburgregional.org</a> and conversation with Darlene Stone

### *Nursing Home Ombudsman Agency of the Bluegrass, Inc.*

Organization/Program	<b>Nursing Home Ombudsman Agency (NHOA) of the Bluegrass, Inc.</b>
Program Purpose	The agency hires ombudsmen, ranging in age from 50 to more than 80 years, to provide advocacy and support for residents in long-term care facilities and to assist families with questions about placement in those environments.
Program Description	<p>Established in 1981, NHOA is one of the first of approximately 500 long-term care ombudsman programs in the nation to make the job a paying one—\$7 an hour—and one of the few to fill it almost exclusively with people over 50.</p> <p>NHOA’s ombudsmen range in age from 50 to 80-something and come from careers as diverse as law enforcement, teaching, accounting, and homemaking. They work varying part-time schedules, from 8 to 35 hours per week. The ombudsmen spend at least 30 minutes per month visiting with and advocating for each nursing home resident. The care they provide is free to residents and families; costs are covered by a variety of public and private sources. The job, while rewarding, is a tough one. In addition to working with residents and staff, ombudsmen often have to work with estranged families and with attorneys handling guardianship cases.</p>
Progress	This year, NHOA ombudsmen made more than 5910 separate visits to the residents of the area’s 54 nursing homes and their families, handling concerns and advocating for quality care. Office staff provided 492 instances of information and assistance to consumers, and 38 consultations with providers of long-term care services.
Contact Information	Kathleen Gannoe Executive Director 859-277-9215
Source	<a href="http://www.ombuddy.org">www.ombuddy.org</a> and conversation with Kathleen Gannoe

## ReServe Elder Service, Inc.

Organization/Program	<b>ReServe Elder Service, Inc.</b>
Program Purpose	The purpose of this organization is to match people over 55 with stipend-paying, part-time jobs in the nonprofit and public sectors in the New York City area.
Program Description	<p>ReServe is a two-year-old nonprofit that is founded on two main principles. First, ReServe draws not only on the time of older adults but also on their lifetime skills, offering them the satisfaction of doing what they can do best. Second, ReServe goes beyond the old world of senior volunteering by paying stipends. ReServe believes that when money changes hands, both sides—the older adults and the employers—feel a deeper commitment to the work.</p> <p>All ReServists are paid a \$10-per-hour stipend and serve the organization as attorneys, social workers, teachers, artists, communications specialists, youth workers, bankers, and health professionals. The work options are varied and may include teaching art, marketing, fundraising, and health advocacy for isolated elders.</p> <p>Each organization that applies to ReServe receives a Program Officer that works to fill job vacancies with ReServists. ReServe pre-screens all applicants and when they find a good match, they send a short bio and resume for the organization to review. The employer determines whether to interview the candidate and makes the final hiring decision. In addition, ReServe handles the payroll for all participating employers, saving them time and money.</p> <p>ReServe has been funded to date exclusively by foundations, corporate and individual grants, and donations. The money raised covers the costs of running the program and is intended to cover the cost of stipends for those placed in jobs. However, most host-organizations have been so pleased with the caliber of workers that they've paid the stipends themselves.</p>
Progress	<p>In less than two years, ReServe has become a recognized source of skilled employees aged 55 and over for dozens of New York City nonprofits and city agencies.</p> <p>Today there are 360 ReServists, 215 of whom have been placed in about 60 host organizations in tasks ranging from senior management to the reception desk. They work on average 15 hours a week, approximately 46 weeks of the year. Negotiations are in progress with another 30 nonprofit/public sector agencies for placement of 200 ReServists who range in age from 55 to 75.</p>
Contact Information	<p>Claire Haaga Altman          Executive Director          718-923-1400, ext.248  <a href="mailto:chaltman@reserveinc.org">chaltman@reserveinc.org</a></p>
Source	<a href="http://www.reserveinc.org">www.reserveinc.org</a>

## Retiree Work Opportunities Program

Organization/Program	The Retiree Work Opportunities Program is administered by the <b>University of California-Berkeley</b> .
Program Purpose	The Retiree Work Opportunities Program is an online resource to publicize part-time, temporary and short-term, project-based assignments and house profiles of retired staff members who want to be considered for those work opportunities. The purpose of the program is to match UC Berkeley retirees with department heads looking to fill temporary vacancies on campus.
Program Description	<p>Retired staff members post online web profiles and/or resumes highlighting their skills and interests, UC work history, and preferences for scheduling and placement. They can edit their profiles and update their availability whenever they want. Hiring managers post opportunities on the website, stating skills needed, project duration, and schedule.</p> <p>Department managers seeking to fill a job can contact retirees directly, or retirees can initiate contact with managers if they see a listing of interest to them. Once hired, the retiree is paid by the department that posted the job.</p> <p>The website now lists only non-academic jobs, but the Center is planning to add part-time, temporary projects for academics and potentially volunteer opportunities for academics and staff.</p>
Progress	<p>Started in 2002, currently there are over 473 UC Berkeley retirees and more than 334 hiring managers registered and using the Retiree Work Opportunities website to find each other. About 80 percent of the opportunities listed on the website are filled by UC retirees.</p> <p>The program has been very successful in a number of ways. For the university, bringing back experienced retirees is advantageous. Retirees have a built-in network, and in some cases, act as mentors to younger staff. Retirees find value in it, too, seeing this as an opportunity to learn new skills in different areas around campus.</p>
Contact Information	Gloria Parra Program Manager 510-643-3212 <a href="mailto:gjparra@berkeley.edu">gjparra@berkeley.edu</a>
Source	<a href="http://thecenter.berkeley.edu">http://thecenter.berkeley.edu</a> and conversation with Gloria Parra

## Active Older Adult Recruitment Program/YMCA

Organization/Program	The Active Older Adult Recruitment Program is offered through the <b>YMCA of Greater Rochester (NY)</b> .
Program Purpose	Older adult employees serve as mentors and role models for younger staff, bring strong skills and stability, reduce staff turnover, and match the needs of an increasing number of YMCA members who are themselves over 50.
Program Description	<p>In 2004, the YMCA started the Silver Sneakers fitness program, targeting their older adult members. Almost immediately, the YMCA experienced a tremendous surge in membership of people over 50 years of age. The YMCA recruited some of these members to work at the organization. Soon after, the YMCA began to change its personnel policies to attract older employees, offering alternative work arrangements, including job sharing, part-time positions (as little as four hours per week), and flexible work schedules. It began to recruit with the help of Lifespan, a Rochester nonprofit that provides training and job placement programs for people over 55, the local Veterans Affairs office, and Rochester Works.</p> <p>The YMCA provides free training and free membership for all its employees. And it has added a program called Mentoring Across Generations to foster inclusiveness and teambuilding between the younger and older employees. In the past few years, 75 pairs have met regularly for career advice and friendship.</p>
Progress	Since the effort began, the percentage of employees over 50 has increased by a third, now numbering over 400. This number increases every year. The effort has also been a big success with the older members of the club, since they report feeling more comfortable with the older workers. The older employees are more reliable, more likely to complete assignments, and more skilled at speaking and writing than younger employees. Plus, the turnover rate for those 50 and older is just 2 percent, compared to 20 percent overall.
Contact Information	Fernan Cepero VP, Human Resources 585-263-3907 <a href="mailto:fernanc@rochesterymca.org">fernanc@rochesterymca.org</a>
Source	<a href="http://www.civicventures.org/breakthrough/reports/BTAreport.pdf">www.civicventures.org/breakthrough/reports/BTAreport.pdf</a> and conversation with Fernan Cepero

## Learning from Civic Engagement Programs

### Experience Corps

Organization/Program	<b>Experience Corps</b>
Program Purpose	Experience Corps is an award-winning national program that engages people over 55 in meeting their communities' greatest challenges.
Program Description	<p>Experience Corps members tutor and mentor in cities across the country, providing literacy coaching, homework assistance, consistent role models and committed, caring attention. Members tutor children who need basic literacy skills, mentor students who count on them for guidance, partner with classroom teachers to make schools better places to learn, and ultimately help create healthier communities.</p> <p>Experience Corps is a distinct model and approach defined by six key elements: focus on outcomes, high member commitment, rigorous member training, team-based approach, critical mass of members, and leadership development.</p> <p>Experience Corps taps into the desire for older adults to be engaged in the community, leveraging their capacity to create lasting change. Experience Corps also conducts the research necessary to deliver the best results to students and volunteers.</p> <p>All Experience Corps members are volunteers. Stipends are available depending on the number of volunteer hours served per week.</p>
Progress	<p>To date, Experience Corps is administered in 23 cities across the United States. It currently has 2,000 members and 20,000 students.</p> <p>Experience Corps has made a significant impact on students, schools, community organizations and members. Independent research shows that Experience Corps boosts student academic performance, helps schools and youth-serving organizations become more successful, and enhances the well-being of older adults in the process.</p>
Contact Information	<p>Experience Corps National Office 202-478-6190 <a href="mailto:info@experiencecorps.org">info@experiencecorps.org</a></p>
Source	<a href="http://www.experiencecorps.org">www.experiencecorps.org</a> and conversations with Star Bressler and Megan McCarthy

## RespectAbility

Organization/Program	RespectAbility is a program of the <b>National Council on Aging (NCOA)</b> .
Program Purpose	RespectAbility is a collaborative initiative that helps nonprofit organizations harness and measure the human resource potential of adults aged 55 years and older through active engagement in new service and work roles that help build capacity and address vexing social problems.
Program Description	<p>NCOA is a national leader in enhancing the capacity and effectiveness of organizations and communities by helping them develop innovative approaches to harnessing the time, talent, and experience of adults 55 and older.</p> <p>The RespectAbility Initiative provides the innovative tools, effective practices, and expert training and technical assistance necessary to help organizations and communities increase their investment in and commitment to America’s growing resource of experienced and skilled older adults.</p> <p>Specifically, RespectAbility will:</p> <ul style="list-style-type: none"> <li>• Devise new approaches to planning and coordinating the development of leadership- and professional-level roles in nonprofit organizations for adults 55+</li> <li>• Develop a compelling argument and “business case” through data collection and analysis to justify nonprofit leaders’ increased commitment to and investment in tapping the new human resource assets of an aging society.</li> </ul>
Progress	<p>Two reports released by the RespectAbility Initiative—<i>RespectAbility in America: Promising Practices in Civic Engagement among Adults 55+</i> and <i>Profiles of the Most Promising Initiatives Engaging Adults 55+</i>—showcase the most promising practices for involving adults 55+ in civic engagement efforts.</p> <p>RespectAbility leads a 22-site research and demonstration effort titled Models of Significant Service.</p> <p>RespectAbility launched a documentary film, <i>The Open Road: America Looks at Aging</i>, in July 2005. This film examines the personal and social impact of the baby boomers’ retirement.</p> <p>RespectAbility conducted a survey of a select group of the nation’s leading nonprofit organizations that shows nonprofits are largely unequipped to use older Americans as volunteers.</p>
Contact Information	<p>Sabrina Reilly Associate Director of Civic Engagement and Director, RespectAbility <a href="mailto:sabrina.reilly@ncoa.org">sabrina.reilly@ncoa.org</a></p>
Source	<a href="http://www.respectability.org">www.respectability.org</a> and email exchange with Sabrina Reilly

## Retired Senior Volunteer Program (RSVP)

Organization/Program	RSVP is a program of the <b>Corporation for National and Community Service: Senior Corps Program</b> .
Program Purpose	RSVP is America's largest volunteer network for people aged 55 and over that connects volunteers with service opportunities in their communities.
Program Description	<p>RSVP offers 55+ individuals a full range of volunteer opportunities with thousands of local and national organizations. RSVP offers flexibility and choice to its volunteers as it matches the personal interests and skills of older adults with opportunities to serve their communities.</p> <p>RSVP volunteers choose how and where they want to serve, ranging from a few hours to more than 40 hours a week. RSVP volunteers provide hundreds of community services, such as:</p> <ul style="list-style-type: none"> <li>• Tutoring children in reading and math</li> <li>• Building houses</li> <li>• Helping get children immunized</li> <li>• Modeling parenting skills to teen parents</li> <li>• Participating in neighborhood watch programs</li> <li>• Planting community gardens</li> <li>• Providing counsel to new business owners</li> <li>• Offering relief services to victims of natural disasters</li> <li>• Helping community organizations operate more efficiently</li> </ul> <p>Volunteers choose whether they want to draw on their current skills or develop new ones. All volunteers receive pre-service orientation, training from the organization where they serve, supplemental insurance while on duty, and an array of local member benefits.</p>
Progress	<p>RSVP has been running nationally for over 35 years.</p> <p>700 RSVP programs are currently run by organizations across the country. Programs can be located by state by visiting the Senior Corps website.</p> <p>RSVP currently has nearly 500,000 volunteers serving in communities across the country.</p>
Contact Information	<p>Senior Corps 202-606-5000 202-606-3472 (TTY)</p>
Source	<a href="http://www.seniorcorps.gov">www.seniorcorps.gov</a> and conversation with Megan McCarthy

## Wisdom Works

Organization/Program	Wisdom Works is an initiative of the <b>National Council on Aging (NCOA)</b> .
Program Purpose	Wisdom Works piloted the use of self-directed teams of older adults as a strategy to help nonprofit organizations build their capacity while helping older adults discover ways to help solve community problems. This program represents a new approach to volunteering and a new model of civic engagement: self-directed, self-managed teams of seniors tackling community needs.
Program Description	<p>Wisdom Works was piloted in two phases.</p> <p>Phase I was launched in 2004 when eight community organizations were awarded grants of \$12,500 to create self-directed, diverse teams of mature volunteers to identify critical problems in their community, select the problem upon which they felt they could have the greatest impact, and develop strategies aimed at solving or minimizing that problem. The teams were encouraged to develop additional resources to address the community problem and create tangible results, thereby demonstrating the impact of the volunteer effort on the community.</p> <p>Phase II built upon lessons learned in Phase I with a focus on senior centers. In May 2006, six senior centers received grants of \$25,000 to conduct civic engagement projects using self-directed teams over a 20-month period. Senior center leaders were encouraged to develop non-traditional partnerships for civic engagement experiences external to the senior center. In cooperation with community agencies, organizations, and businesses, senior centers utilized newly retired older adults to address community needs by working effectively in self-directed teams with minimal staff support. The centers received financial support, plus training in transformational leadership and facilitation for both volunteer leaders and key staff. The centers were asked to partner with other community groups to broaden the impact of the projects, to enable centers to provide more services to their communities, enhance the well-being of senior volunteers, and appeal to baby boomers entering retirement.</p> <p><b>Example: Arlington Office of Senior Adult Programs (VA)</b></p> <p>The proposed plan utilized a self-directed team of volunteers to create Senior Connections Cafés in senior centers and offer Transitions Workshops to assist similarly aged community residents to transition to new roles and service opportunities beyond the senior center. The plan included Internet cafés and peer coaches trained by Wisdom Works volunteers, along with Transitions Workshops offering seminars on topics such as civic engagement, leisure, lifelong learning, and retooling for new careers.</p>
Progress	For more information on outcomes and findings of the Wisdom Works pilot, full evaluation reports for Phase I and Phase II can be found at <a href="http://www.ncoa.org">www.ncoa.org</a> .
Contact Information	Constance Todd Associate Director, Civic Engagement Director, Wisdom Works 202-479-6683 <a href="mailto:Constance.todd@ncoa.org">Constance.todd@ncoa.org</a>
Source	<a href="http://www.ncoa.org">www.ncoa.org</a> and conversation with Constance Todd

## Appendix C: Additional Mature Worker Resources

For further information on mature workers issues, or to access specific reports mentioned in this paper, please see the below list of recommended readings and resources:

- **BreakThrough Award.** Ten innovative nonprofit organizations or employers, that utilize the passion and experience of people over 50 to deliver their mission and improve society, are honored in this publication by the MetLife Foundation and Civic Ventures. <http://www.civicventures.org/breakthrough/reports/BTAreport.pdf>
- **The Business Case for Workers Age 50+: Planning for Tomorrow's Talent Needs in Today's Competitive Environment.** This report, developed for AARP by Towers Perrin, outlines why employers should view 50+ workers as valuable contributors to their workforce. It provides documentation to the business community that attracting and retaining mature, experienced workers is critical to maintaining a competitive advantage in the new labor market. [http://assets.aarp.org/rgcenter/econ/workers\\_fifty\\_plus.pdf](http://assets.aarp.org/rgcenter/econ/workers_fifty_plus.pdf)
- **Business Executives Attitudes Toward the Aging Workforce: Aware But Not Prepared?** To understand business executives' views toward 50+ workers, and corporate America's preparedness for the aging of the workforce, AARP contracted with Business Week Research Services to conduct a survey of business decision-makers. Survey results are outlined in this report. [http://assets.aarp.org/rgcenter/econ/aging\\_workforce.pdf](http://assets.aarp.org/rgcenter/econ/aging_workforce.pdf)
- **The Civic Enterprise: A New Network for Civic Engagement in Later Life.** Developed for the National Academy on an Aging Society, this map contains links to the growing network of organizations—in the private, public, and nonprofit sector—that are working with the business, media, and philanthropic communities to define a new vision of aging that focuses on older adults as an untapped resource. <http://www.agingociety.org/agingociety/civic-engagement-diagram.html>
- **The Conference Board Employer Practices Locator.** Through a searchable database, this tool provides users with access to articles and reports on current employer practices and case studies related to the mature workforce. <http://www.conference-board.org/knowledge/knowledgeDB/matureWorkforce.cfm>
- **Current Strategies to Employ and Retain Older Workers.** Prepared by the Urban Institute, and commissioned by the U.S. Department of Labor Employment and Training Administration, this publication describes current strategies used by employers to help attract and retain older workers and by nonprofit organizations, educational institutions, and the government to facilitate their employment. [http://www.urban.org/UploadedPDF/411626\\_olderworkers.pdf](http://www.urban.org/UploadedPDF/411626_olderworkers.pdf)
- **Experience Wave Fact Sheet.** Experience Wave provides an online fact sheet with statistics on America's aging population, older adults' plans for continued work, and the importance of engaging this demographic. [http://www.experiencewave.org/newsroom/fact\\_sheets?id=0001](http://www.experiencewave.org/newsroom/fact_sheets?id=0001)
- **Healthcare Employer Toolkit.** The Corporation for a Skilled Workforce and Experience Works designed this toolkit for employers in the healthcare industry who are interested in recruiting and retaining an older workforce. <http://www.skilledwork.org/pdfs/Older%20healthcare%20worker%20toolkit.pdf>

- **Pathways to Encore Careers.** Developed by the MetLife Foundation and Civic Ventures, this publication highlights ten community colleges that received Encore Career Grants to design innovative programs that prepare boomers for work in education, healthcare and social services. <http://www.civicventures.org/communitycollege/reports/ECCreport.pdf>
- **Putting Experience to Work: A Guide to Navigating Legal and Management Issues Relating to a Mature Workforce.** Co-authored by David Micah Kaufman and Deborah Weinstein, this book gives practical management advice and describes some of the legal challenges and alternatives employers face in grappling with mature workforce issues. The guide is designed to fill the gap in knowledge—legal, managerial, and cultural—on how to engage mature workers and get the most from their knowledge and abilities. <http://www.conference-board.org/publications/booklist.cfm>
- **Reinvesting in the Third Age: Older Adults and Higher Education.** The American Council on Education conducted this two-year research project to call attention to the educational needs of older adults. Results are outlined in the following reports:
  - The first publication, **Framing New Terrain: Older Adults and Higher Education**, provides a profile of the country’s older adults and frames questions and issues that higher education institutions must consider to better meet older adults’ needs and increase their engagement in postsecondary education. <http://www.acenet.edu/Content/NavigationMenu/ProgramsServices/CLLL/Reinvesting/Reinvestingfinal.pdf>
  - The second publication, **Mapping New Directions: Higher Education for Older Adults**, discusses and analyzes additional information obtained from two focus groups with older adults, a nationwide institutional survey, and two regional roundtables of higher education and other sector leaders. <http://www.acenet.edu/Content/NavigationMenu/ProgramsServices/CLLL/Reinvesting/MapDirections.pdf>



# CAEL

The Council For Adult & Experiential Learning

CAEL pioneers learning strategies for individuals and organizations. We advance lifelong learning in partnership with educational institutions, employers, labor organizations, government, and communities. CAEL works to remove policy and organizational barriers to learning opportunities, identifies and disseminates effective practices, and delivers value-added services. CAEL aims to create a world of learners and ensure that adult education takes place anywhere and everywhere possible, whether in the classroom, at the office or factory, or within community-based or government-sponsored programs.



## Compete.

Council on  
Competitiveness

The Council on Competitiveness is the only group of corporate CEOs, university presidents and labor leaders committed to ensuring the future prosperity of all Americans through enhanced competitiveness in the global economy and the creation of high-value economic activity in the United States.

A non partisan, non governmental organization in Washington, D.C., the Council believes the best way to drive prosperity in a global economy is to have the most competitive workforce and business environment. The Council shapes the debate on competitiveness by bringing together business, labor, academia and government leaders to evaluate over-the-horizon economic challenges and opportunities. Ideas are moved from concept to action using a process that demonstrates value along the way. Conferences, seminars, and special events are used to disseminate the Council's findings and recommendations to experts, policy makers, government officials, media and the general public.

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