

# Career Transition Service Leadership Feasibility Study

Conducted and written by  
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Leadership Greater Hartford, Inc.

*with the generous support of the  
Hartford Foundation for Public Giving*

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## Acknowledgements

Projects like this one are birthed as concepts and ideas and transformed by thought, conversation, and action. They require untold amounts of patience, nurturance, discipline, and encouragement. They are never solo acts- they require and facilitate connections that sometimes start before the project and often last long after. I am deeply appreciative of the people who have influenced and supported this project from the beginning, especially the following. Their energy and efforts made this report possible.

Jay Bloom, the president and CEO of Morrison Child and Family Services in Portland, Oregon, a friend and colleague for over 25 years, whose early thinking about and ongoing interest in the potential of the Boomer generation to give back to their communities have re-ignited my passion over the past three years.

Ted Carroll, the president of Leadership Greater Hartford, whose creativity and openness to new ideas allowed this project to develop under the wings of one of the nation's foremost leadership development organizations.

Michael Bangser, the executive director of Hartford Foundation for Public Giving, whose understanding of the potential community impact this issue has led his organization to financially support the closer examination of the opportunities, challenges, and strategies.

Marc Freedman, the founder and president of Civic Ventures and author of *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America*; Phoebe and Jack Ballard, the founders of Turning Points, authors, and trailblazers in helping people create a dynamic "third half of life"; and Doe Hentschel, the program director of the innovative Third Age Initiative at Leadership Greater Hartford- your visionary and model-building work inspires and sustains me.

All the people who contributed the rich tapestry of information and life experience to this study by participating in interviews, and who demonstrated their belief in the potential benefits that might result from this project.

Thirteen volunteers who served as project interviewers were drawn to the project for a variety of reasons- their own search for purposeful connections, a desire to contribute to a project that could make a difference in the community, a chance to think about future personal or career changes. They ranged from being employed, full- and part-time, to being retired, to being in career/ job transition. All told, these volunteers conducted over 80 interviews and committed over 300 hours of professional services to the project.

The Project Design Team- just as the contributions of the volunteer interviewers added to the depth and richness of this study's findings, this project could not have been accomplished if not for the passion, expertise, and commitment provided by Bill McKendree and The Clarion Group. Special appreciation and recognition goes to Darcy Topper and Elaine McDonald whose expert guidance and steady presence were as important as the over 250 hours of professional time they together contributed to the project.

Thank you one and all.

*Stephen Ristau July 2003*

# Executive Summary

## Project Overview: Purpose and Methodology

### PURPOSE

There is increasing evidence that the so-called “baby-boomer” generation, those born from 1946-1964 and numbering 76 million nationally, is re-defining the pre-retirement and retirement years. Many in this age group are seeking new careers and work, both paid and unpaid, that has greater meaning and purpose, often involving making a contribution or connection to their community.

Leadership Greater Hartford (LGH) launched *The Career Transitions Project* feasibility study to examine the potential of mid- and later- career professionals to apply their experience and skills to civic needs.

The Career Transitions Project seeks to expand the understanding and knowledge of this phenomenon in greater Hartford by answering the following questions:

- How large is this demographic group?
- Why are baby-boomers looking for greater community connections or participation?
- To what extent is compensation a necessity or are they willing to consider reducing salary and other compensation in order to make such a commitment?
- What expertise do they bring to civic interests and what new skills and knowledge would they need to learn?
- Can nonprofit groups utilize this talent in meaningful ways?
- Can communities and organizations find effective ways of facilitating these career transitions?

The Career Transitions Project assesses the assets and needs of the Boomer population in the greater Hartford region, and the opportunities and challenges they face as they transition through their later careers to the “traditional” age of retirement. In similar fashion, it also examines the state of the nonprofit sector nationally and in the greater Hartford region. Finally, this study surveys the existing voluntary and for-profit systems and organizations that serve as “brokers” between these two groups to better understand their perceptions of this trend and to identify tools, effective practices, and initiatives that might increase and/or strengthen the connections. Ultimately, the goal of this study is to contribute to the potential for older adults to live integrated, meaningful lives that make a difference, and for nonprofit, community service organizations to be more effective in carrying out their missions by making better use of these human resources.

## METHODOLOGY

The Career Transition Project is a formative research study that examines the greater Hartford community to help us understand the interests, attributes, and needs of different target populations -- baby-boomers and nonprofit organizations -- in the community. Through this examination, we hope to establish a positive baseline relationship with the target populations, and a better understanding of the essential elements of a potential program initiative before developing or launching such an initiative.

We have achieved these outcomes by:

- Conducting individual key informant interviews with samples of the target populations in greater Hartford: a.) Boomers/ experienced professionals interested in service to communities (41); b.) Leaders of nonprofit organizations (31); and representatives of broker organizations who assist people in making volunteer and employment connections (21).
- Surveying research literature on national, state, and regional aging trends including longevity/ health status, retirement planning, financial stability, motivations/ needs, lifestyles, philanthropy, and volunteerism; and researching analytical literature on the nonprofit sector.

### Geographic Area

The focal area of this study is the Hartford Capitol Region. This region is comprised of the State Capitol of Hartford, Connecticut and the 28 contiguous communities surrounding it. For comparative purposes, regional, state and national data are also used in this report.

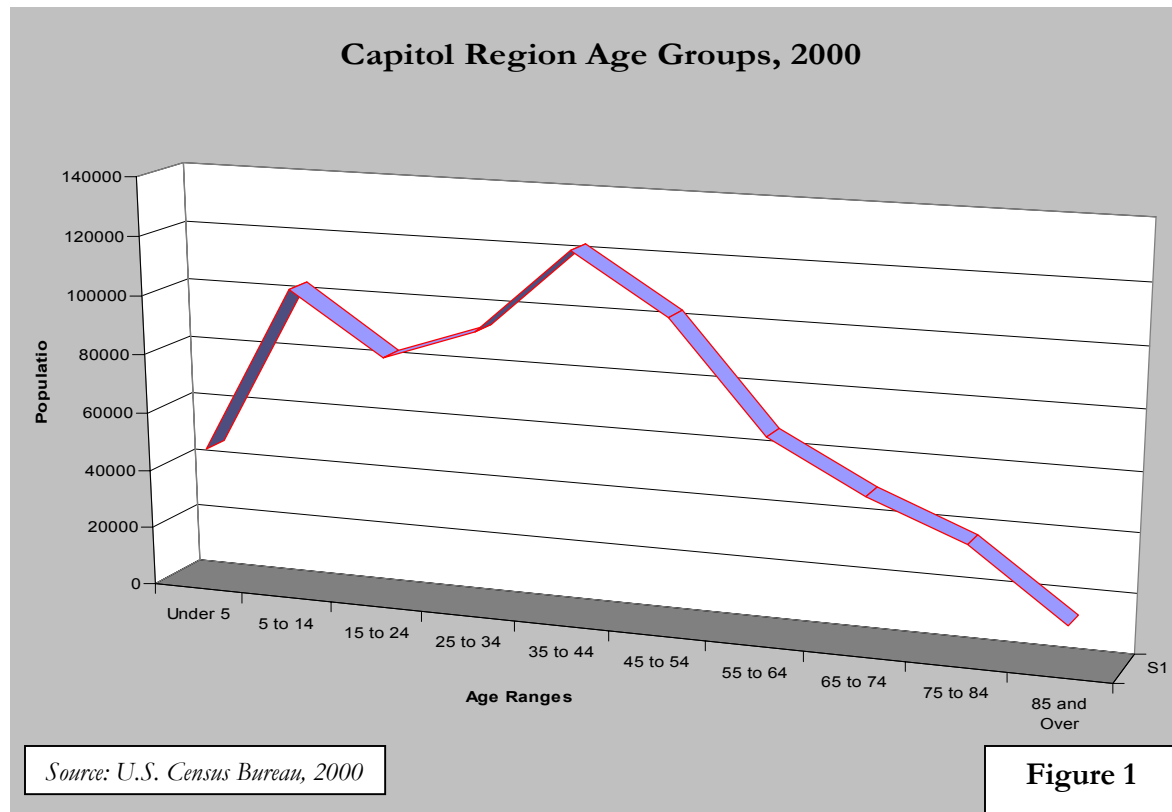
### Timeframe

The study was conducted from January to June 2003 with the key informant interviews taking place from February to April.

## Key Findings

**FINDING: Boomers number over 226,000 in the Hartford Capitol Region or 31 percent of the total regional population.** Almost twice the size of the generation ahead of them (ages 55-74) and over a quarter bigger than the generation behind them (ages 15-34), the boomers living and working in the greater Hartford area promise to remain a powerful influence on and contributor to the region's socio-economic fabric in the years ahead (Figure 1).

**FINDING: Eighty percent of experienced professionals from the for-profit and public sectors interviewed in this study reported that they would consider work in a nonprofit organization;** nearly two-thirds indicated interest in paid employment, one-half in unpaid

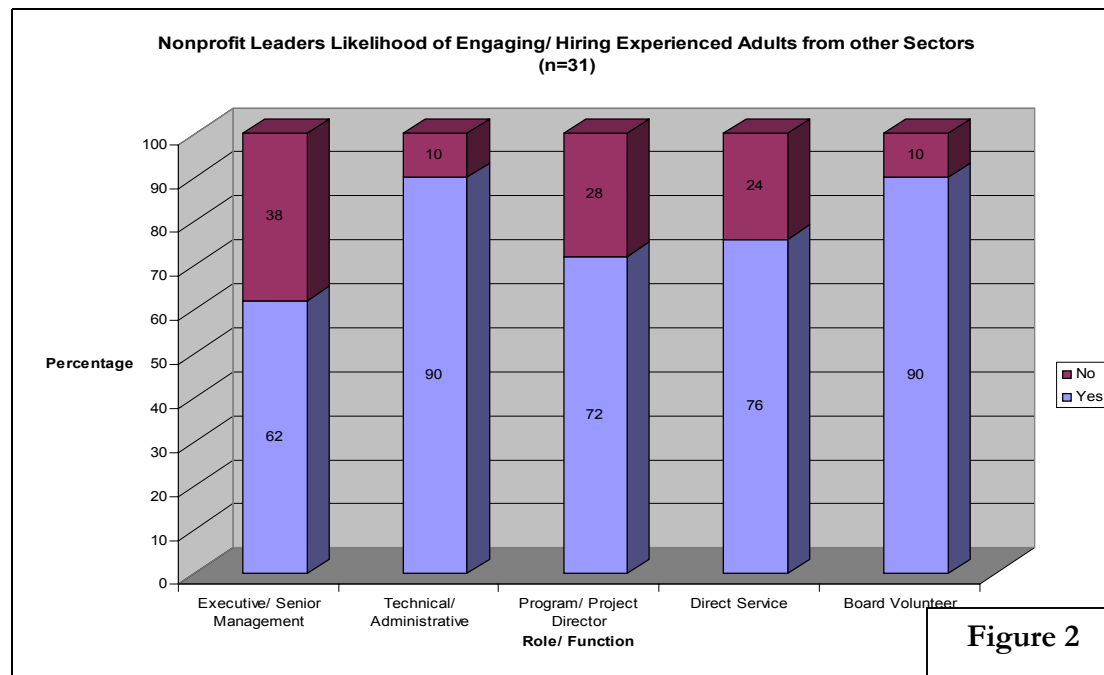


volunteerism, and one-quarter in contracting or temporary employment.<sup>1</sup> When asked whether they would prefer to work full-time or part-time, responses were split equally in half.

**FINDING:** Those experienced adults who reported that they would not consider work in a nonprofit organization (20 percent of sample) cite financial concerns as the most significant barrier.

<sup>1</sup> People interviewed in this study could select more than one work option, thereby resulting in totals over 100 percent.

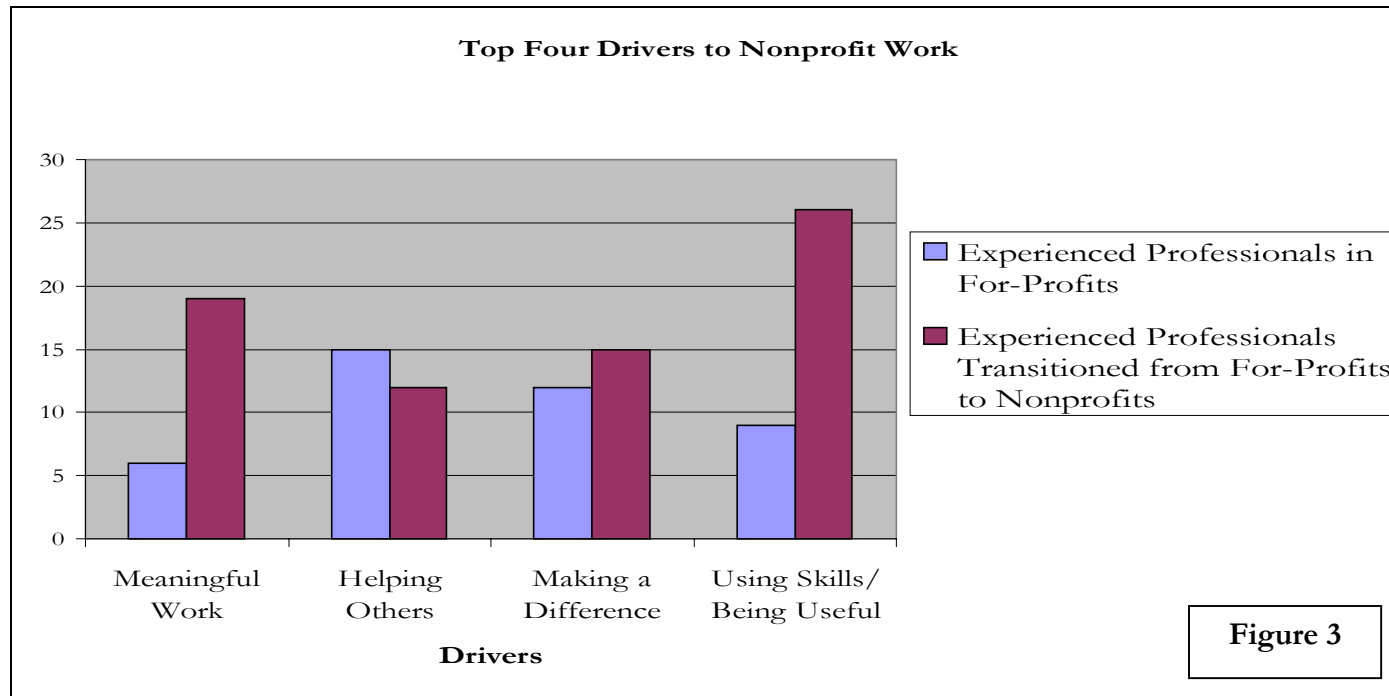
**FINDING: Ninety-seven percent of the nonprofit leaders surveyed report that they would be “likely to engage/ hire a boomer with other-sector experience.”** Ninety-three percent report they would hire/ engage experienced adults as paid employees, 86 percent as contract or temporary employees, and 97 percent as unpaid volunteers<sup>2</sup> (Figure 2).



**Figure 2**

**FINDING: In considering or making a move to a nonprofit organization, the top motivators for boomers are *helping others, making a difference, using their skills and finding meaningful work.* They want to have an impact, be respected and appreciated, and make community connections. They are attracted to flexible work schedules and health care benefits.** What is almost as revealing as their reasons why they would or did make such a move to the nonprofit sector are their reasons why not. Earning an income or leaving stressful working conditions in another sector were at the bottom of the list of motivating drivers reported (Figure 3).

<sup>2</sup> Nonprofit leaders interviewed in this study could select more than one work option, thereby resulting in totals over 100 percent.



**FINDING:** The top nonprofit area experienced professionals expressed interest working in was human and social services. Education, spiritual/ faith-based, leadership development, and health services are also prominently mentioned-interests.

**FINDING:** All groups surveyed identified fund-raising/ financing as the number one challenge facing nonprofits today, by as much as a 2:1 margin. The remaining top challenges identified by all groups surveyed are public relations/ communications; management/ administrative infrastructure (finance, human resources, and information technology); marketing; and multi-skilled personnel.

**FINDING:** The top competencies and qualities experienced professionals believe they bring to nonprofit work are leadership/ management/ organizational skills; financial/ fund development skills; marketing/ communications/ public relations skills; caring for others; and a willingness to learn.

**FINDING: The top competency/ quality, by a 2:1 margin over the next highest desired competency, that nonprofit leaders look for in human resources is a sense of commitment to mission.** These are followed in order by creativity/ flexibility; public relations/ communications skills; information technology skills; fund development skills; self-initiative/ risk-taking; and other-oriented/ open to listening and learning.

**FINDING: All groups surveyed agree that experienced adults from outside the nonprofit sector have skills that the nonprofit sector can use. Almost all agree that nonprofit organizations need help expanding the use of experienced workers from outside sectors.**

**FINDING: All groups surveyed agree that people from outside the nonprofit sector have unrealistic ideas about the nonprofit culture and demands. And, while the vast majority does not believe they are irreconcilable, most do agree that there are culture clashes when business people move into nonprofit organizations.** Nonprofit leaders expressed concerns that the valuable addition of business skills and practices not be at the expense of the nonprofit sector's core values and culture of service and community-building.

**FINDING: Compared with workers who are not in nonprofit organizations now, experienced professionals who have already transitioned to the nonprofit sector were almost twice as likely to think that the *nature of the work* in the nonprofit sector is better than that in the for-profit or public sectors, and four times as likely to think the *work climate/conditions* are better. They agree, almost unanimously, that the financial rewards are worse.** This study's sample recognizes the generally-accepted fact that compensation levels in the nonprofit sector fall short of comparable positions in the private and public sectors.

**FINDING: Based on their reports of what level of compensation experienced adults would need in a nonprofit position and what nonprofit leaders would pay, there is no evidence that a significant compensation gap would create a barrier to engagement.** In fact, nearly one-quarter of those currently in the for-profit or public sectors and 10 percent of those already transitioned reported that financial compensation was not needed at all.

**FINDING: Nonprofit leaders say that successful transitions into their sector from other sectors are facilitated when people are motivated by the mission, when they feel a part of the team, when they understand and accept the inherent trade-offs, when they understand themselves (needs, values and motivations), and when expectations are clear.** Their ideas on what could make more successful transitions include better orientation, including preparation before engagement, and more openness to and patience with people from other sectors.

**FINDING: Many nonprofit leaders, especially those in small organizations, cite limited resources as an on-going barrier to recruiting, orienting, and training paid and unpaid human resources.** They also report that in times of declining funding, support for these critical human resource functions is stretched even further.

**FINDING: Over two-thirds of nonprofit leaders interviewed reported that they would use, and possibly pay for, a local resource that would assist them in these human resource functions.**

## Conclusions

- There exists a unique opportunity to utilize the talents, experience and motivation of older adults at midcourse in meaningful work in the nonprofit sector. Overwhelmingly, baby-boomers and nonprofit leaders see this potential.
- While it is *mission* or the search for meaning and purpose that drives boomers to nonprofit organizations, questions about *sustained commitment* to the mission seem to trouble nonprofit leaders the most about boomers interested in transitioning to the sector. With each group seeking an alignment of values and action, there seems to be fertile ground to explore the mutual benefits that greater linkages between these two groups could bring.
- While compensation and other financial benefits are not among the top drivers cited by pre-retirees regarding work in retirement, people in this study mirrored national survey statistics<sup>1</sup> that for economic and cultural reasons, many boomers anticipate continuing to work for some level of pay.
- Nonprofit organizational leaders, while acknowledging this opportunity, are not prepared to capitalize on it, and need help both conceptually and operationally. Many nonprofit leaders in this study offered that if a credible organization or entity led this effort, they would pay for a “pooled” resource that would help them address critical workforce needs.
- Training, orientation, and introductory internships might help create the necessary bridges between the sectors. Both sides carry some perceptions of what the other sector is about, not always favorable and sometimes a barrier to purposeful and productive relationships.
- There is a paucity of local resources designed to assist individuals in midcourse transition to examine their assets, interests, and goals, and to explore the opportunities for contribution in the nonprofit sector specifically. While a number of organizations exists to provide some of these functions (outplacement services, volunteer placement, job banks), none provide the kind of hands-on “bridge-work” required to prepare highly experienced older adults and nonprofit organization for mutual, purposeful

relationships. Current volunteer matching programs are undercapitalized and often limited in scope to address this opportunity adequately.

- The establishment of a local resource that targets aging baby-boomers in transition has an expanding potential of addressing critical community issues. It can also help people who are approaching the traditional retirement years with different needs and expectations but without a template to navigate this new life stage. New partnerships between the for-profit, nonprofit and public sector are possible.

## Introduction

Baby-boomers, like the nonprofit organizations whose missions attract so many of them, find themselves in a world of rapid change and unpredictability. Just over three years ago at the turn of the century, the American stock market had reached an historic high point. Technology companies, dot coms, and many new business start-ups enjoyed prolific profits in the mid-to-late 1990s fueling unprecedented federal and state budget surpluses, and engendering dream-like visions of transforming philanthropy and nonprofit causes with infusions of private and public funds. Further, talk of young, energetic, and financially-secure men and women infiltrating the nonprofit sector with their passion, talent, and pocketbooks promised brighter futures on every corner.

But the promise of halcyon days burst most dramatically with the September 11, 2001 terrorist attacks. The economic decline or “correction” as some economists term the leveling-off process that had begun before the attacks, has intensified since then, impacting individuals’ retirement savings, increasing joblessness rates, and burdening government coffers with growing deficits. The almost omnipotent confidence of the late 1990s has been replaced at worst with a sense of “recession-like” doom and gloom, and at best with the adaptivity and resilience to change characteristic of the American spirit in general and of the nonprofit sector in particular.

The September 11 attacks have had profound effects on us as individuals and as a nation of diverse peoples. Notwithstanding the stresses of the “new normal” state of anxiety and uncertainty, the attacks resulted in an almost involuntary response of caring and compassion, and a resolve to preserve the freedoms and privileges that mark our nation’s founding. They have resulted in greater personal reflection, discernment, and action to live more intentionally -- to live more purposefully. The initial caring response to the many individuals, families, and communities affected by the September 11 attacks re-ignited the call to service in many Americans.

President George W. Bush sounded the clarion to action in his 2002 State of the Union address:

*“...Now Americans deserve to have this same spirit directed toward addressing problems here at home...None of us would ever wish the evil that was done on Sept. 11, yet after America was attacked it was as if our entire country looked into a mirror and saw our better selves. We were reminded that we are citizens, with obligations to each other, to our country and to history. We began to think less of the goods we can accumulate, and more about the good we can do...In the sacrifice of soldiers, the fierce brotherhood of firefighters and the bravery and generosity of ordinary citizens, we have glimpsed what a new culture of responsibility could look like. We want to be a nation that serves goals larger than self. We’ve been offered a unique opportunity and we must not let this moment pass. My call tonight is for every American to commit at least two years – 4,000 hours over the rest of your lifetime – to the service of your neighbors and your nation.”*

# Project Overview: Purpose and Methodology

## PURPOSE

**“In the time we have, it is surely our duty to do all the good we can to all the people we can in all the ways we can.”**

**William Barclay**

There is increasing evidence that the so-called “baby-boomer” generation, those born from 1946-1964 and numbering 76 million nationally, is re-defining the pre-retirement and retirement years. Many in this age group are seeking new careers and work, both paid and unpaid, that has greater meaning and purpose, often involving making a contribution or connection to their community.

Leadership Greater Hartford (LGH) launched *The Career Transitions Project* feasibility study to examine the potential of mid- and later- career professionals to apply their experience and skills to civic needs.

The Career Transitions Project seeks to expand the understanding and knowledge of this phenomenon in greater Hartford by answering the following questions:

- How large is this demographic group?
- Why are baby-boomers looking for greater community connections or participation?
- To what extent is compensation a necessity or are they willing to consider reducing salary and other compensation in order to make such a commitment?
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- Can nonprofit groups utilize this talent in meaningful ways?
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The Career Transitions Project assesses the assets and needs of the Boomer population in the greater Hartford region, and the opportunities and challenges they face as they transition through their later careers to the “traditional” age of retirement. In similar fashion, it also examines the state of the nonprofit sector nationally and in the greater Hartford region. Finally, this study surveys the existing voluntary and for-profit systems and organizations that serve as “brokers” between these two groups to better understand their perceptions of this trend and to identify

tools, effective practices, and initiatives that might increase and/or strengthen the connections. Ultimately, the goal of this study is to contribute to the potential for older adults to live integrated, meaningful lives that make a difference, and for nonprofit, community service organizations to be more effective in carrying out their missions by making better use of these human resources.

## METHODOLOGY

***Work in a nonprofit community organization means “activities completed by employees, independent contractors, and stipended/ unpaid volunteers.”***

***Career Transition Project definition***

The Career Transition Project is a formative research study that examines the greater Hartford community to help us understand the interests, attributes, and needs of different target populations -- baby-boomers and nonprofit organizations -- in the community. Through this examination, we hope to establish a positive baseline relationship with the target populations, and a better understanding of the essential elements of a potential program initiative before developing or launching such an initiative.

We have achieved these outcomes through the following methods:

- Established a project design team comprised of the project leader, pro bono consultants from The Clarion Group, and representatives from Leadership Greater Hartford to oversee the design and implementation of the project including the development and testing of interview surveys; orientation and training of interviewers; data collection, coding, and analysis; and formulation of results.
- Engaged and trained 13 highly skilled and motivated volunteers to conduct interviews, report data, and assist in data analysis and the formulation of conclusions.
- Conducted individual key informant interviews with samples of the target populations in greater Hartford: a.) Boomers/ experienced professionals interested in service to communities (41); b.) Leaders of a variety of nonprofit organizations (31); and representatives of broker organizations who assist people make volunteer and employment connections (21).
- Surveyed research literature on national, state, and regional aging trends including longevity/ health status, retirement planning, financial stability, motivations/ needs, lifestyles, philanthropy, and volunteerism; and researched analytical literature on the nonprofit sector.

### **Geographic Area**

The focal area of this study is the Hartford Capitol Region. This region is comprised of the State Capitol of Hartford and the 28 contiguous communities surrounding it. For comparative purposes, state and national data are also used in this report.

### **Timeframe**

The study was conducted from January to June 2003 with the key informant interviews taking place from February to April.

### **Project Design Team**<sup>3</sup>

The project design team served as the organizing body for the project both in oversight and implementation roles from beginning to end. This team supported the project consultant in the development and testing of interview surveys; orientation and training of interviewers; data collection, coding, and analysis; and formulation of results.

### **Interview Survey Instruments**<sup>4</sup>

The interview surveys were developed, tested and approved for administration by the project design team. The surveys were tailored to four subgroups of the project's target populations: 1.) boomers/ experienced professionals who are working in the for-profit or public sectors and are interested in work in a nonprofit field (survey A1); boomers/ experienced professionals who have already transitioned from careers in the for-profit sector to the nonprofit sector (survey A2); nonprofit leaders (survey B); and brokers (survey C).

All four survey instruments contained core questions and requested similar information for comparison purposes, and contained additional questions specific to the target group. The instruments combined open-ended and forced-choice questions and took between 60-90 minutes to administer in an in-person interview format.

### **Interview Teams**<sup>5</sup>

Over twenty people, many of them people representative of the boomer/ experienced professionals target group we studied, inquired about assisting with the project's interviews. Ultimately, 13 individuals volunteered to participate in this most critical project function. We organized the interviewers into target group teams to ease their training on and administration of particular survey instruments, and to establish a process for the later review of data findings and formulation of results. We conducted three project orientation and interviewer training sessions in February, and two data review sessions in April.

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<sup>3</sup> See List of Project Design Team Members in Appendix, page ii.

<sup>4</sup> For more information about the Interview Survey Instruments used in this study, contact Stephen Ristau at 860-267-1671 or [ristau@adelphia.net](mailto:ristau@adelphia.net).

<sup>5</sup> See List of Interview Team Members in Appendix, page ii.

### **Definitions of Terms**

This project introduces the concept of *work in a nonprofit community organization* as meaning “activities completed by employees, independent contractors, and stipended/ unpaid volunteers.” This expansion of the *work* concept along a continuum of paid and unpaid activities challenges more traditional definitions of work as exclusively paid and volunteerism as exclusively unpaid. It is the bias of the project’s author that, due to many of the trends cited in this report, such distinctions may not serve well current and future populations interested in serving the community nonprofit or voluntary sector.

By definition, the *baby-boomer generation* is comprised of those people born between 1946 and 1964; as such, at the time of this project, they range in age from 39 to 57. Year 2000 data from the U.S. Census Bureau used in this report means that boomers ranged in age from 36 to 54 at the time of that survey. While those interviewed for this study are generally described as boomers, some of those interviewed were born before 1946 or after 1964.

The term *experienced professional* is used to describe the individuals we interviewed about their possible or actual move to work in the nonprofit sector from another sector. Generally, these persons have had careers in fields outside the nonprofit sector that require an array of managerial, technical, or specialized skills and competencies. In general, they are highly-skilled and have advanced degrees or education beyond the high school level.

The definitions used for *for-profit*, *public*, and *nonprofit sectors* follow common understanding related to the three broad areas of the U.S. economy. The for-profit sector refers to the corporate marketplace ranging from small, privately-owned businesses to large publicly-traded conglomerates; the public sector refers to the functions of government or public services including public education; and the nonprofit sector, commonly referred to as the voluntary or third sector, is a label reserved for those organizations who carry special tax exemption status for their charitable, educational, or philanthropic purposes.

The term *broker* in this project describes the variety of organizations whose chief function is to facilitate employment and/or volunteerism through screening, assessment, placement, and/ or transition services, and includes both for-profit and nonprofit entities involved in career transition services, volunteer matching, etc.

### **Demographics Sample Selection**

Subjects from each of the target groups sampled were invited to participate in key informant interviews and did so voluntarily. Among the *boomers/ experienced professionals* group, effort was made to include both people who are working in the for-profit or public sectors and are

interested in work in a nonprofit field, as well as boomers/ experienced professionals who have already transitioned from careers in the for profit sector to the nonprofit sector.

The boomer/ experienced professionals sampled in this study are not representative of the entire population of people living and working in Greater Hartford who were born between 1946 and 1964. They are decidedly more educated and better off financially than the general boomer population; in addition, in the main, they describe themselves as interested in the mission-driven work of nonprofit, community organizations. However, they represent a potentially significant segment of the population whose assets, motivations, skills, and experience may be valuable resources to the nonprofit sector. Although the limits of this study precluded the inclusion of other boomer population segments that are less educated, less skilled, and/or less financially well-off, as well as those who do not identify themselves as interested in nonprofit work, future studies might examine the potential for broader involvement from these groups in the voluntary sector.

We were more intentional and successful in achieving a representative sample of *nonprofit organizations* in greater Hartford, and in engaging the top or senior executives to represent their organizations in this study. Participating nonprofits represent a range of organizational sizes, histories, cultures, fields, and geographic reaches.

Organizations interviewed as part of the *broker* community are representative of the range of for profit and nonprofit resources available for people in career/ employment transition and /or interested in volunteering. The study tested the project's major questions and trend analyses on this group, and examined the models, tools, and processes these organizations use effectively.

# Findings

## KEY FINDINGS

**FINDING: Boomers number over 226,000 in the Hartford Capitol Region or 31 percent of the total regional population.** Almost twice the size of the generation ahead of them (ages 55-74) and over a quarter bigger than the generation behind them (ages 15-34), the boomers living and working in the greater Hartford area promise to remain a powerful influence on and contributor to the region's socio-economic fabric in the years ahead.

**FINDING: Eighty percent of experienced professionals from the for-profit and public sectors interviewed in this study reported that they would consider work in a nonprofit organization;** nearly two-thirds indicated interest in paid employment, one-half in unpaid volunteering, and one-quarter in contracting or temporary employment.<sup>6</sup> When asked whether they would prefer to work full-time or part-time, responses were split equally in half.

**FINDING: Ninety-seven percent of the nonprofit leaders surveyed report that they would be “likely to engage/ hire a boomer with other-sector experience.”** Ninety-three percent report they would hire/ engage experienced adults as paid employees, 86 percent as contract or temporary employees, and 97 percent as unpaid volunteers.<sup>7</sup>

**FINDING: Those experienced adults who reported that they would not consider work in a nonprofit organization (20 percent of sample) cite financial concerns as the most significant barrier.**

**FINDING: In considering or making a move to a nonprofit organization, the top motivators for boomers are *helping others, making a difference, using their skills* and *finding meaningful work*. They want to have an impact, be respected and appreciated, and make community connections. They are attracted to flexible work schedules and health care benefits.** What is almost as revealing as their strong affirmation of the reasons why they would or did make such a move to the nonprofit sector are their

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reasons why not. Earning an income or leaving stressful working conditions in another sector were at the bottom of the list of motivating drivers reported.

**FINDING: The top nonprofit area experienced professionals expressed interest working in was human and social services.** Education, spiritual/ faith-based, leadership development, and health services are also prominently mentioned-interests.

**FINDING: All groups surveyed identified fund-raising/ financing as the number one challenge facing nonprofits today, by as much as a 2:1 margin.** The remaining top challenges identified by all groups surveyed are public relations/ communications; management/ administrative infrastructure (finance, human resources, and information technology); marketing; and multi-skilled personnel.

**FINDING: The top competencies and qualities experienced professionals believe they bring to nonprofit work are leadership/ management/ organizational skills; financial/ fund development skills; marketing/ communications/ public relations skills; caring for others; and a willingness to learn.**

**FINDING: The top competency/ quality, by a 2:1 margin over the next highest desired competency, that nonprofit leaders look for in human resources is a sense of commitment to mission.** These are followed in order by creativity/ flexibility; public relations/ communications skills; information technology skills; fund development skills; self-initiative/ risk-taking; and other-oriented/ open to listening and learning.

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agree, almost unanimously, that the financial rewards are worse. This study's sample recognizes the generally-accepted fact that compensation levels in the nonprofit sector fall short of comparable positions in the private and public sectors.

**FINDING: Based on their reports of what level of compensation experienced adults would need in a nonprofit position and what nonprofit leaders would pay, there is no evidence that a significant compensation gap would create a barrier to engagement.** In fact, nearly one-quarter of those currently in the for-profit or public sectors and 10 percent of those already transitioned reported that financial compensation was not needed at all.

**FINDING: Nonprofit leaders say that successful transitions into their sector from other sectors are facilitated when people are motivated by the mission, when they feel a part of the team, when they understand and accept the inherent trade-offs, when they understand themselves (needs, values and motivations), and when expectations are clear.** Their ideas on what could make more successful transitions include better orientation, including preparation before engagement, and more openness to and patience with people from other sectors.

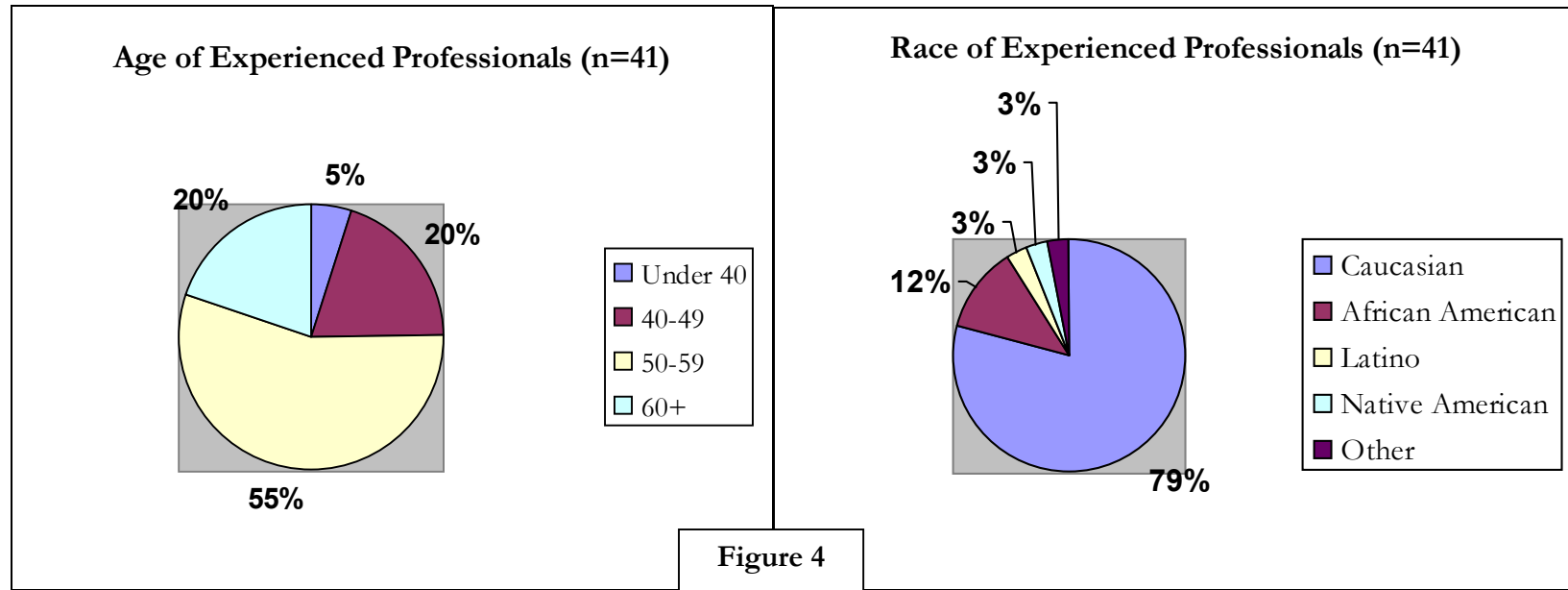
**FINDING: Many nonprofit leaders, especially those in small organizations, cite limited resources as an on-going barrier to recruiting, orienting, and training paid and unpaid human resources.** They also report that in times of declining funding, support for these critical human resource functions is stretched even further.

**FINDING: Over two-thirds of nonprofit leaders interviewed reported that they would use, and possibly pay for, a local resource that would assist them in these human resource functions.**

## CHARACTERISTICS OF PROJECT TARGET POPULATIONS

### Boomers/ Experienced Professionals

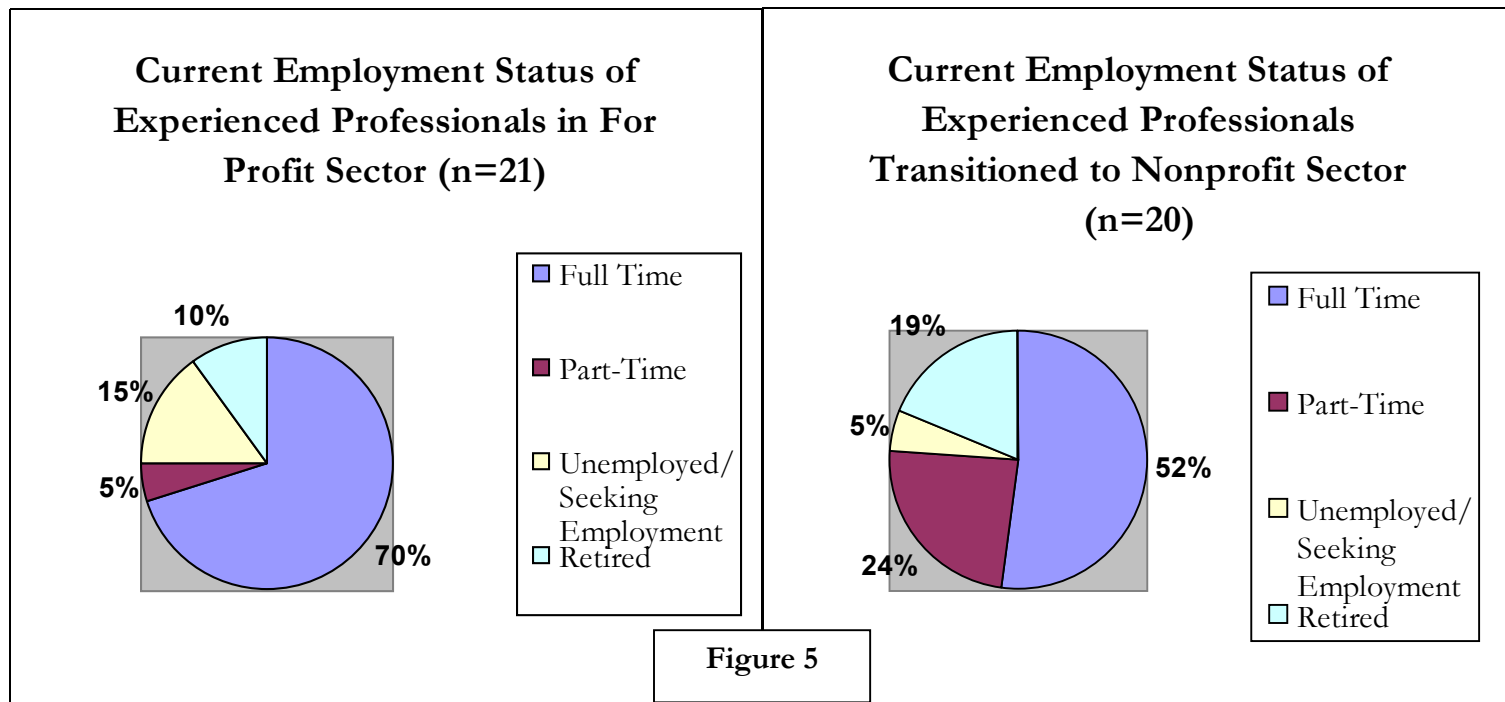
The total sample size of *boomers/ experienced professionals* participating in this study was 41: twenty from the group who are working in the for-profit or public sectors and are interested in work in a nonprofit field (target group A1), and 21 from the group who have already transitioned from careers in the for-profit sector to the nonprofit sector (target group A2). Of the entire boomers sample, over half were aged 50-59, and 20 percent were in the 40-49 age range. Twenty percent of those interviewed were aged 60 or older, born before the start of the baby-boomer generation. While Whites and African- Americans interviewed were fairly representative of the population at large in Hartford County, Latinos or Hispanics were underrepresented in this study <sup>8</sup> (Figure 4). The gender of the entire boomers sample was 51 percent male and 49 percent female with a slightly higher percentage of males in the first (A1) group and a slightly higher percentage of females in the second (A2) group.



<sup>8</sup> According to the U.S. Census Bureau, Census 2000, racial breakdowns for the Hartford County population are White (73 percent), Black or African American (11.7 percent), and Latino or Hispanic (11.5 percent)

Experienced professionals participating in this study resided throughout the Capitol Region. Seventy-five percent of those interviewed lived in the towns/ cities of West Hartford (26%), Hartford (14%), Bloomfield (10%), Farmington (5%), Glastonbury (5%), Granby (5%), Rocky Hill (5%), and Wethersfield (5%). The remaining 25 percent of participating experienced professionals resided in ten other communities in the region.

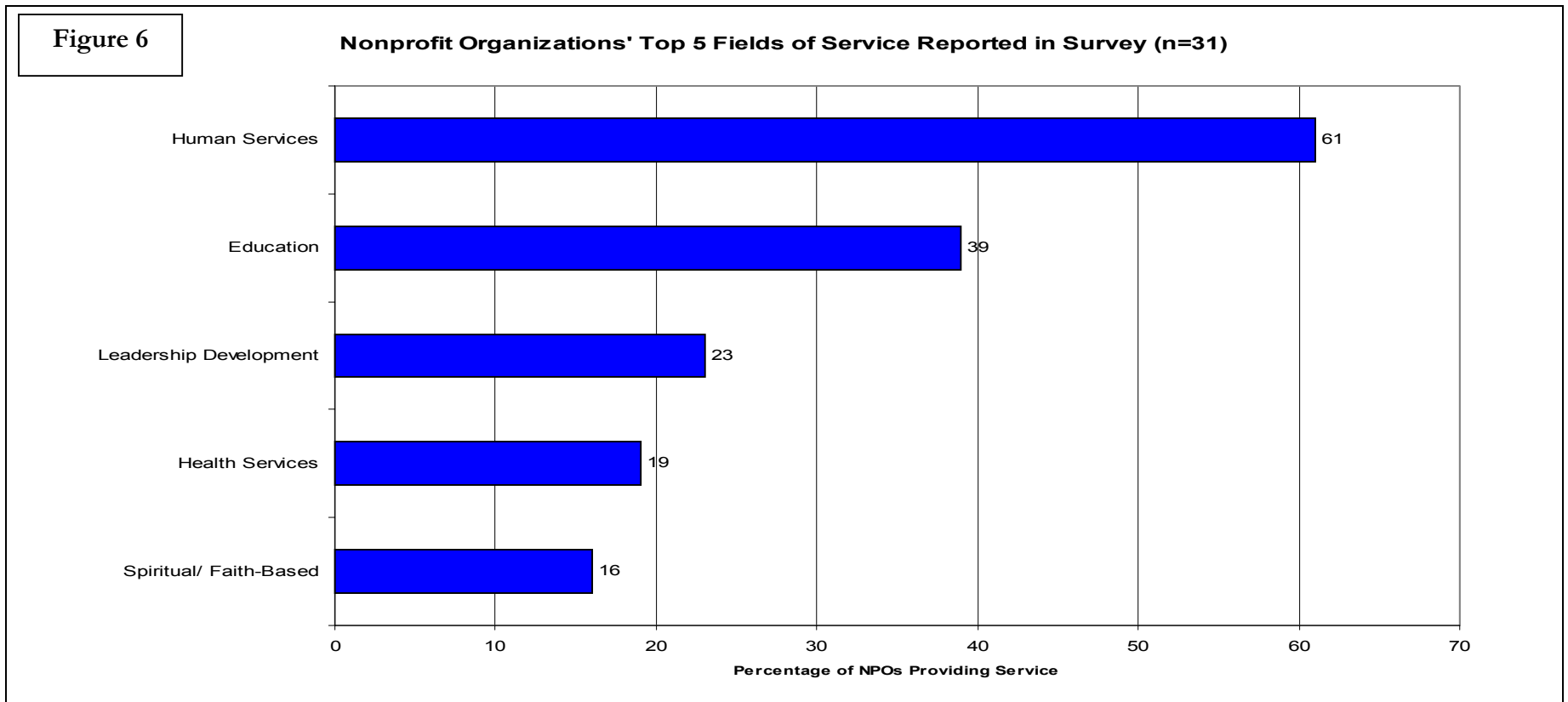
The majority of professionals we interviewed are currently employed full time either in the for-profit (70% from the A1 group) or nonprofit sectors (52% from the A2 group). A significant number of people interviewed (24% from the A2 group) are employed part-time in the nonprofit sector. Fifteen percent of those with for-profit or public sector backgrounds are currently seeking employment (Figure 5).



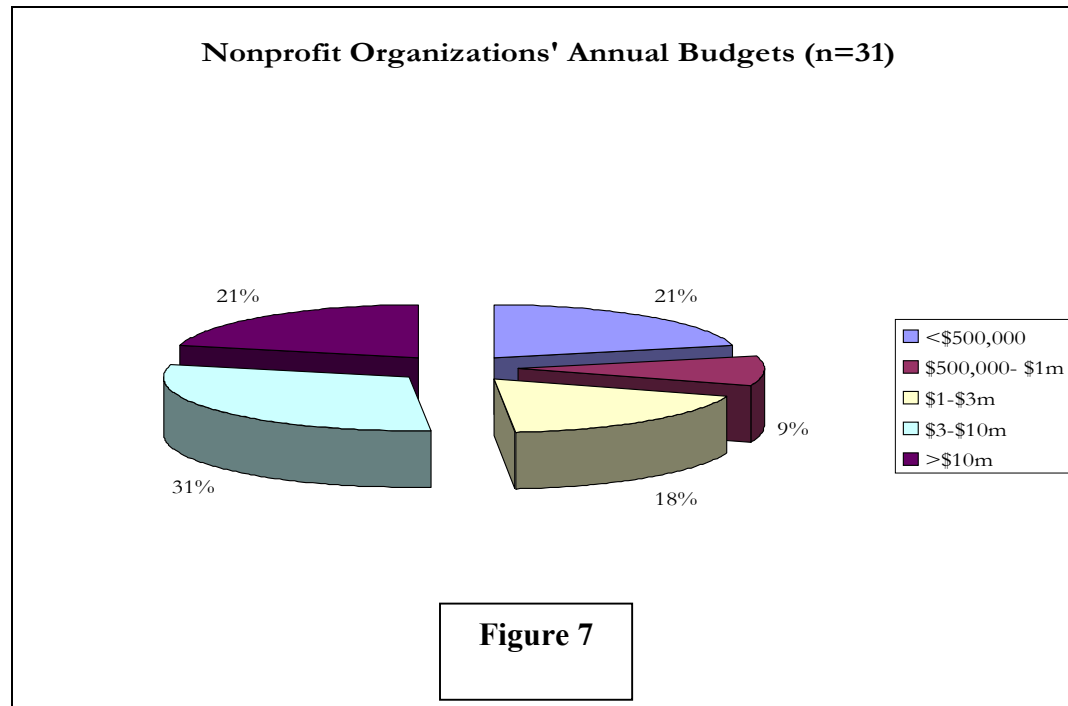
As might be expected, a significant majority of those interviewed (70 percent in the A1 group, 100 percent in the A2 group) had work experience (paid or unpaid) in the nonprofit, community sector. Most had volunteered routinely in their communities over the lifetimes.

### **Nonprofit Organizations**

Thirty-one *nonprofit organizations* participated in the study comprising a range of sizes, fields of service, and histories. When asked to identify the field(s) of service that best characterize their organization (Figure 6), the following were indicated most frequently: Human Services (61%), Education (39%), Leadership Development (23%), Health Services (19%), Spiritual/ Faith-based (16%), Public Policy/ Advocacy (13%), Criminal Justice (13%), and Arts and Culture (10%).



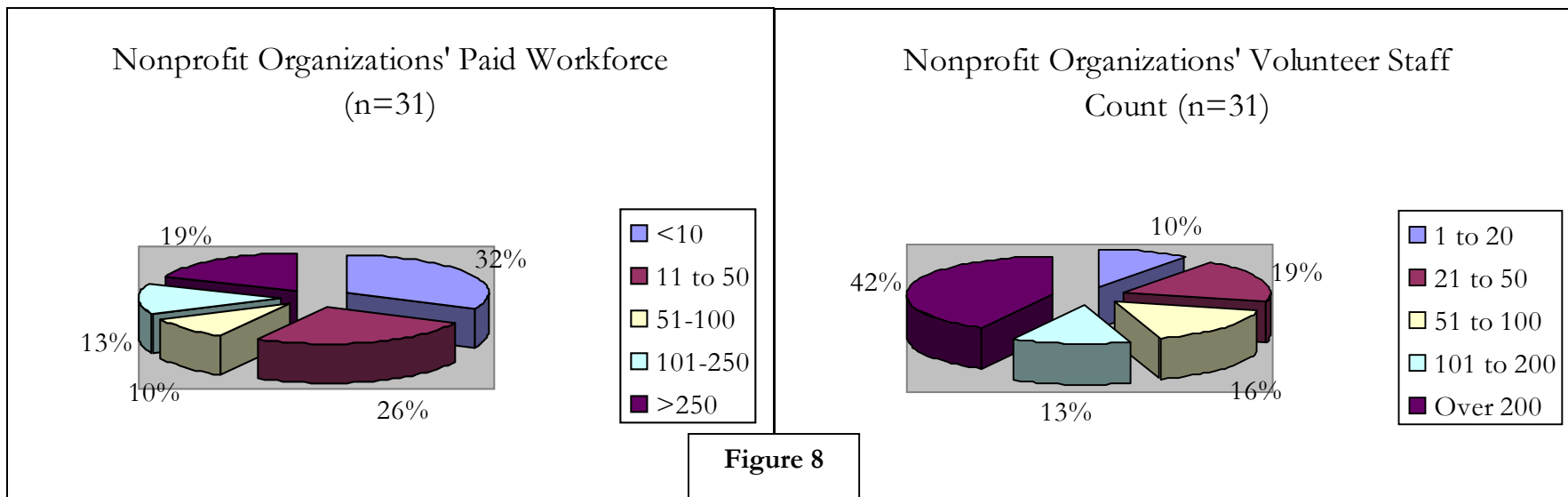
The organizations represented in the study have been in existence from two years to over 200 years with a median age of 30 years. The size of their annual budgets has similar range with the highest concentration in the \$3 to \$10 million range and the median annual budget in the \$1 to \$3 million range (Figure 7). The budgets of organizations represented in this study are slightly larger than those of the general nonprofit landscape in Connecticut.<sup>9</sup>



Since nonprofit organizations' budgets generally are heavily weighted with labor costs, it comes as no surprise that workforce sizes track in parallel to budget size variability; fifty-eight percent of those organizations participating have paid workforces of 50 or less. These organizations,

<sup>9</sup> For more information about the nonprofit landscape in Connecticut, please see pages 45-47 in this report.

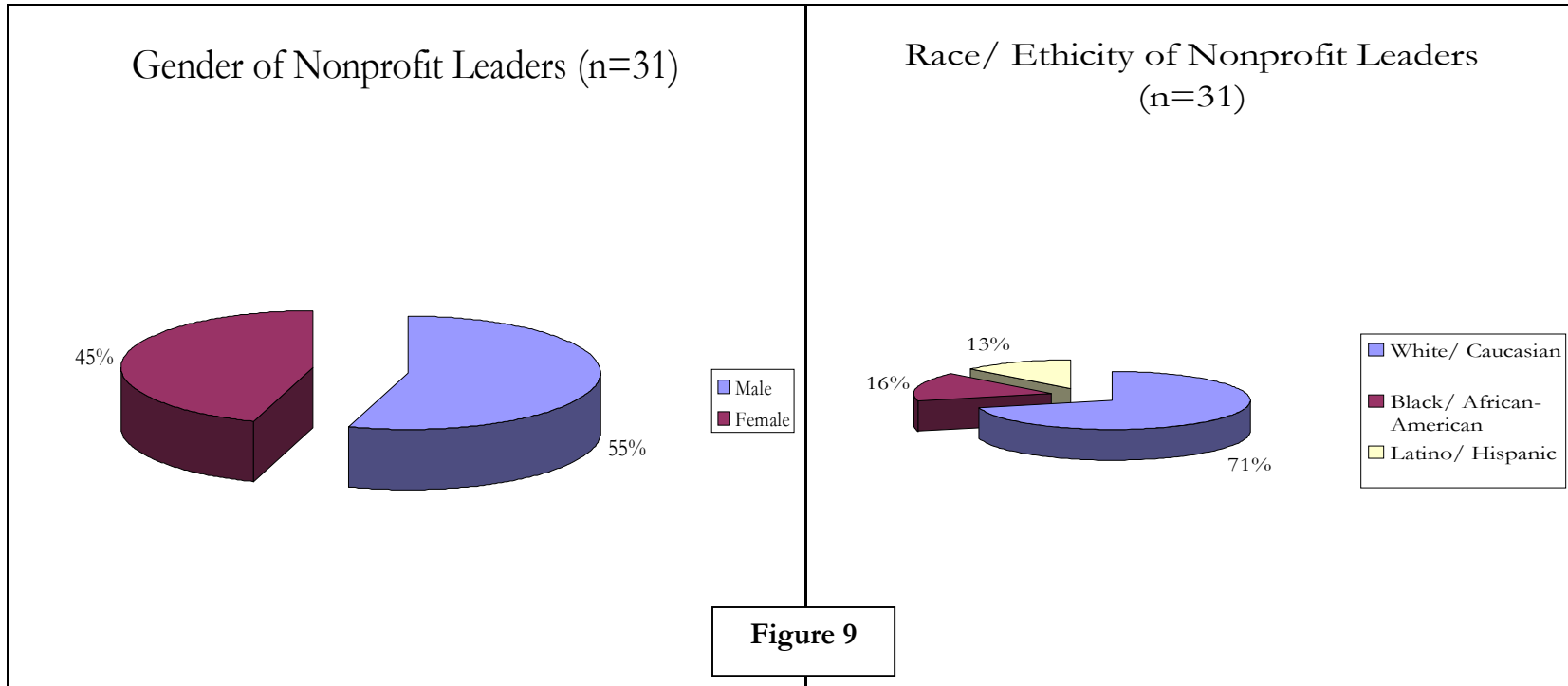
like most nonprofits, make routine use of volunteers. The median number of volunteers used annually was reported between 100 and 110; forty-two percent of the organizations reported using in excess of 200 volunteers annually (Figure 8).



In over 93 percent of the interviews conducted with this target group, the executive director (83%) or a senior level person (10%) represented their organization. The median length of time these individuals have been *with their current organization* is four years (in a range from less than a year to 28 years) but as a group, these men and women have lengthy experience in the nonprofit sector with a median tenure of 25 years. These statistics track favorably with a national study of over 1000 nonprofit executive directors completed in 2001 that found that 51 percent of the executives surveyed had been in their current job for four years or less, and that 45 percent had over 15 years of experience in the nonprofit sector.<sup>ii</sup>

Even with this lengthy nonprofit tenure, fully two-thirds of the nonprofit leaders interviewed in this study reported they had previous work experience in either the public or private sector, a factor supported in the aforementioned national study where over 50 percent of the nonprofit leaders surveyed had other sector experience.<sup>iii</sup> This finding challenges commonly-held perceptions that nonprofit leaders lack certain skills and understanding that comes from work in the private and public sectors.

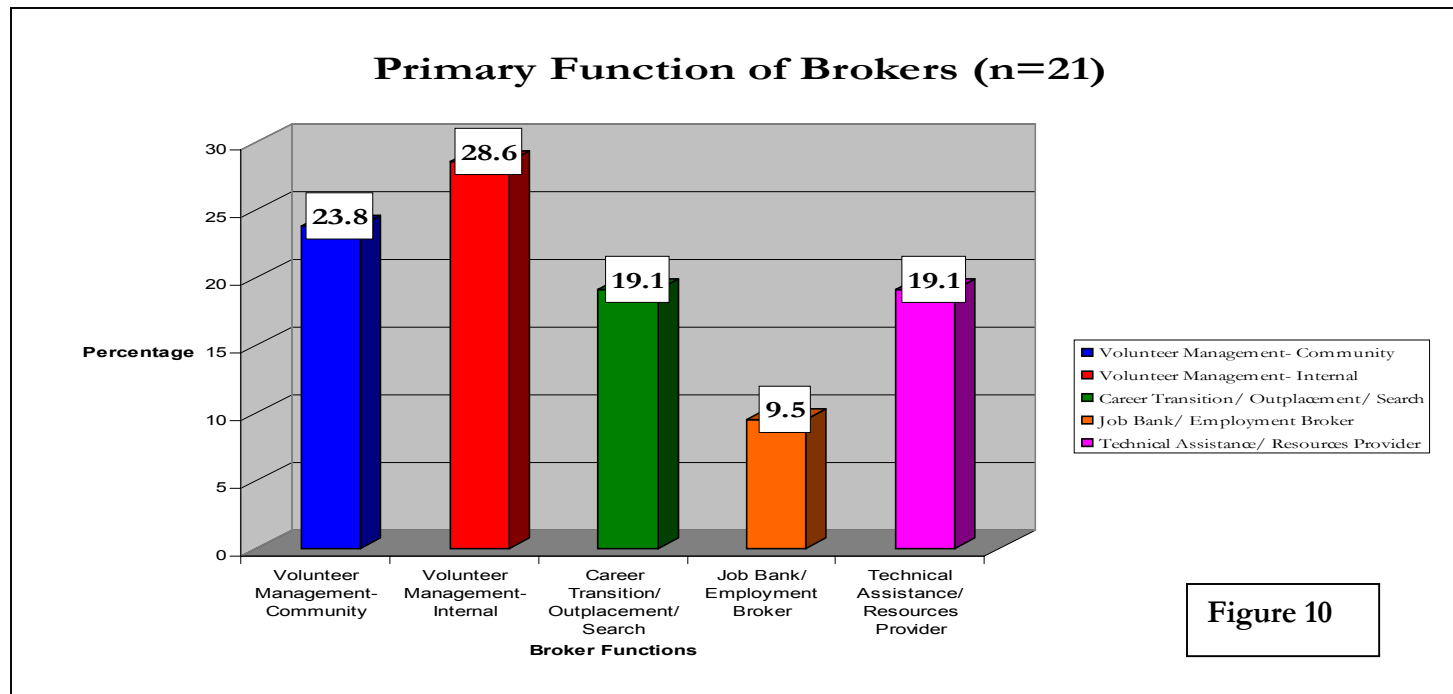
The gender breakdown for the nonprofit leaders in this study was 55 percent male and 45 percent female, remarkably lower than some national statistics that report women holding 62 percent of the executive director positions in nonprofit organizations.<sup>iv</sup> The race/ ethnicity of local leaders studied was 71 percent white/ Caucasian, 16 percent black/ African American, and 13 percent Hispanic/ Latino, slightly more diverse than that of national nonprofit leaders and of the general Hartford County population (Figure 9).



**Brokers**

Twenty-one representatives of organizations we classified as *brokers* participated in the study. Brokers include nonprofit volunteer placement organizations and departments/ programs that perform that work or otherwise support the work of nonprofits, nonprofit job banks and for-profit employment services organizations, and executive search and outplacement/ career transition organizations (Figure 10). There was a diverse range of organizational sizes, capacities, markets (and attendant fee structures), and products and services represented, so diverse that it is

nearly impossible to describe the general characteristics of this group. They included single-staffed programs, large regional institutions, and international firms. All broker organizations are based or have locations in the Hartford region with the exception of one international firm headquartered in Boston.



Most of the brokers in this study are increasingly utilizing technology to support their work with the expected differences in scope and scale between the for-profit and nonprofit sectors. Many spoke of the cost efficiencies their programs or organizations have had to achieve either due to limited funding resources (nonprofits) or the increased competition and “commoditization” in the for-profit markets. Among the impacts of this pressing cost-consciousness are limits in how many individuals can be “processed,” or limits on the amount of “face-to-face” time they can spend with people both before and after placements are made.

## BOOMERS/ EXPERIENCED PROFESSIONALS

**“When boomers reach any stage of life, the issues that concern them—whether financial, interpersonal, or even hormonal—become the dominant social, political, and marketplace themes of the time. And, as we have repeatedly seen, boomers don’t just populate existing life stages or consumer trends, they *transform* them.”<sup>v</sup>**

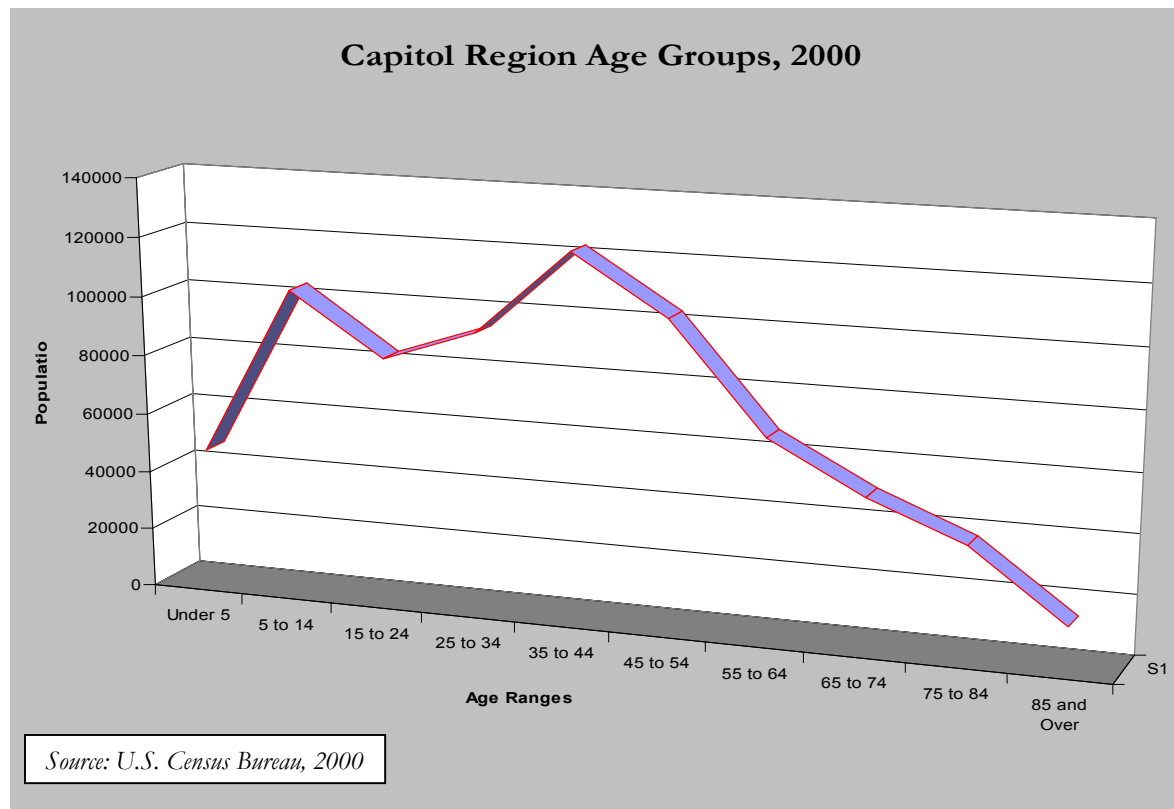
**Ken Dychtwald, *Futurist and Gerontologist***

### **Projected National and Local Size of Boomer Population**

The baby-boomer generation numbers 76 million nationally and comprises nearly 30 percent of the U.S. population. On January 1, 1996, the first Boomer turned 50. The largest (and along with the over age 85 set, the fastest growing) segment of our population, a person turns 50 every eight to eleven seconds today, a trend that will continue for the foreseeable future.<sup>vi</sup> By 2015, Boomers will push the number of 50-and-over adults to more than 108 million.<sup>vii</sup>

According to an analysis of U.S. Census Bureau data (2000) by the Capitol Region Council of Governments, there are nearly 226,000 boomers in the Capitol Region, or 31 percent of the total regional population (Figure 11).<sup>viii</sup> Almost twice the size of the generation ahead of them (ages 55-74) and over a quarter bigger than the generation behind them (ages 15-34), the boomers living and working in the Greater Hartford area promise to remain a powerful influence on and contributor to the region’s socio-economic fabric in the years ahead.

Nationally, boomer- headed households have the highest median income (\$58,218) of all age-headed households;<sup>ix</sup> comparable statistics were not found for boomer-headed households in the Hartford Capitol Region. One can extrapolate that since the median income for all households in Hartford County (\$50,756)<sup>x</sup> is 20 percent higher than the median income for all U.S. households (\$42,148), that the median household income in boomer-headed households in the Capitol Region is higher by a similar factor.



**Figure 11**

As a group, this generation of Americans has better health, greater financial security, higher expectations, and more education than prior generations, and seems motivated to use these assets as an active contributor to society and its fellow citizens.<sup>xi</sup> Over the past century, Americans' life expectancies have skyrocketed from 47 years to over 76 years (Figure 12). Individuals now can expect to live an additional 30 years, years added to the middle of one's life, not to the end.<sup>xiii</sup>

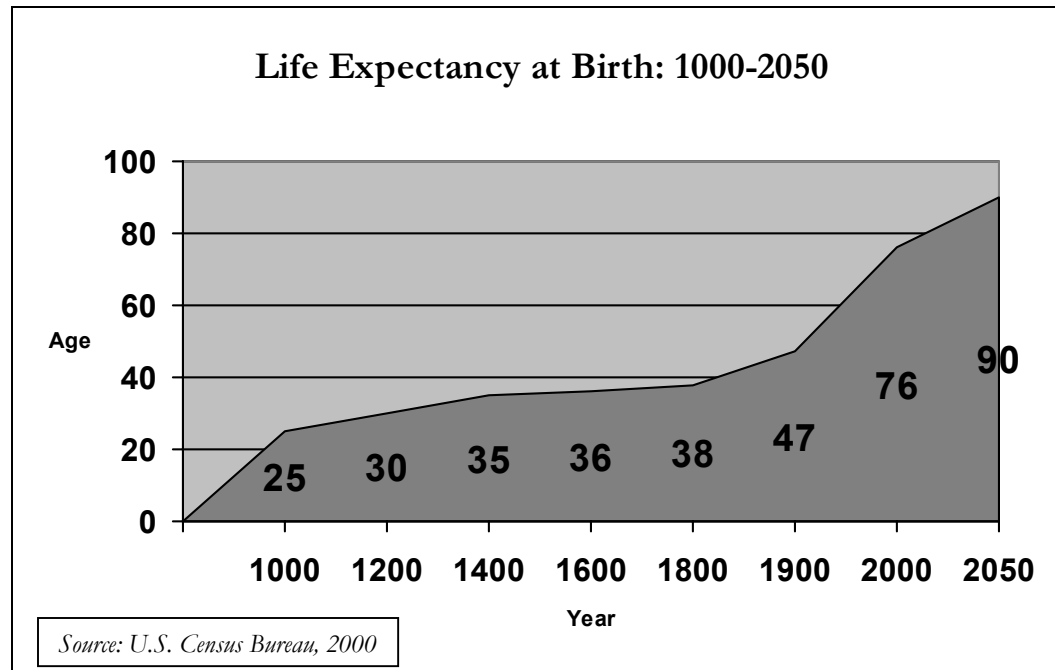


Figure 12

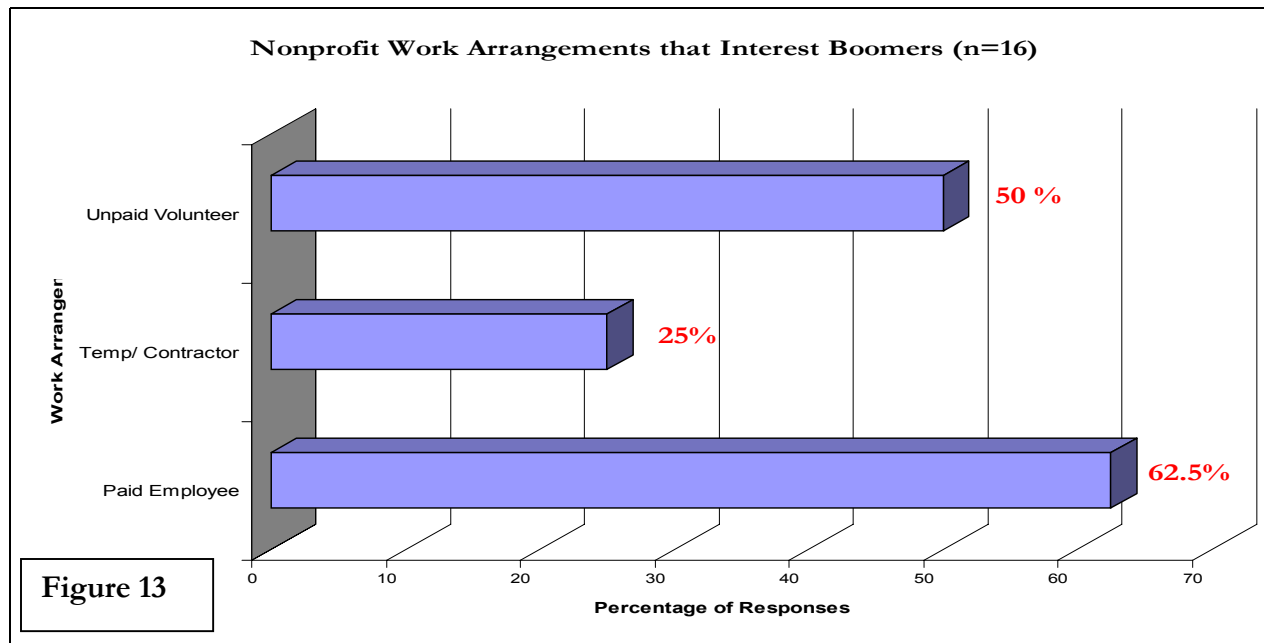
**Motivations, Interests, Talents, and Expectations of Experienced Professionals**

The world that the boomer generation has grown up in has changed in dramatic ways. No previous generation has faced such profound and rapid pace of change in their lifetimes. Similarly, the boomers’ impact on the world around them has been unprecedented. As a result, many social observers and researchers are predicting that boomers will redefine how older adults will face aging, maturity, retirement, work, learning, leisure, and volunteerism.<sup>10</sup>

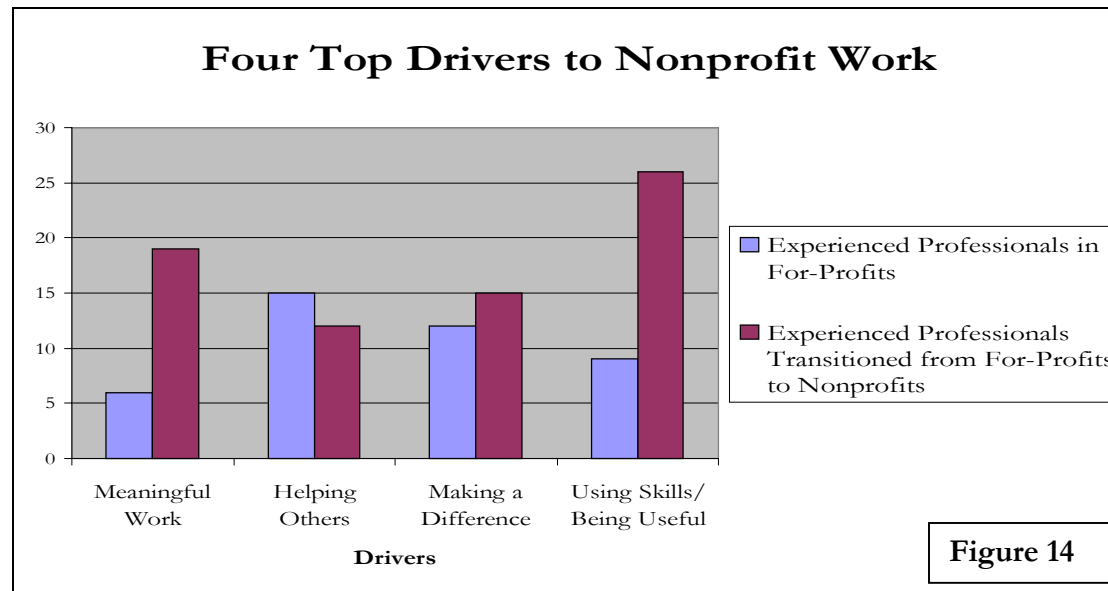
<sup>10</sup> See “Related Research Literature on Boomers and Retirement” in this report, page 42.

In this study, we wanted to understand what experienced professionals -- people with business backgrounds, technical skills and knowledge, and expertise in a range of specialties as diverse as manufacturing processes, information technology, human resources management, law, education, and public service -- were motivated to do in their mid-to-later careers or as they prepared for the traditional retirement years. We also sought out the experience of people with for-profit and public sector backgrounds who already had made a transition to work in the nonprofit sector to understand if there are any differences between what they experienced and what people on the other side of the transition are thinking.

Eighty percent of the people from outside the nonprofit sector we interviewed reported that they would consider working in a nonprofit community organization. Of these 80 percent, when given three work options (respondents were given the choice of selecting any or all of the options) to select from -- *paid employee, contractor/ temporary worker, and unpaid volunteer* -- nearly two-thirds indicated interest in paid employment, one-half in unpaid volunteering, and one-quarter in contracting or temporary employment ( Figure 13). When asked whether they would prefer to work full-time or part-time, responses were split equally in half.

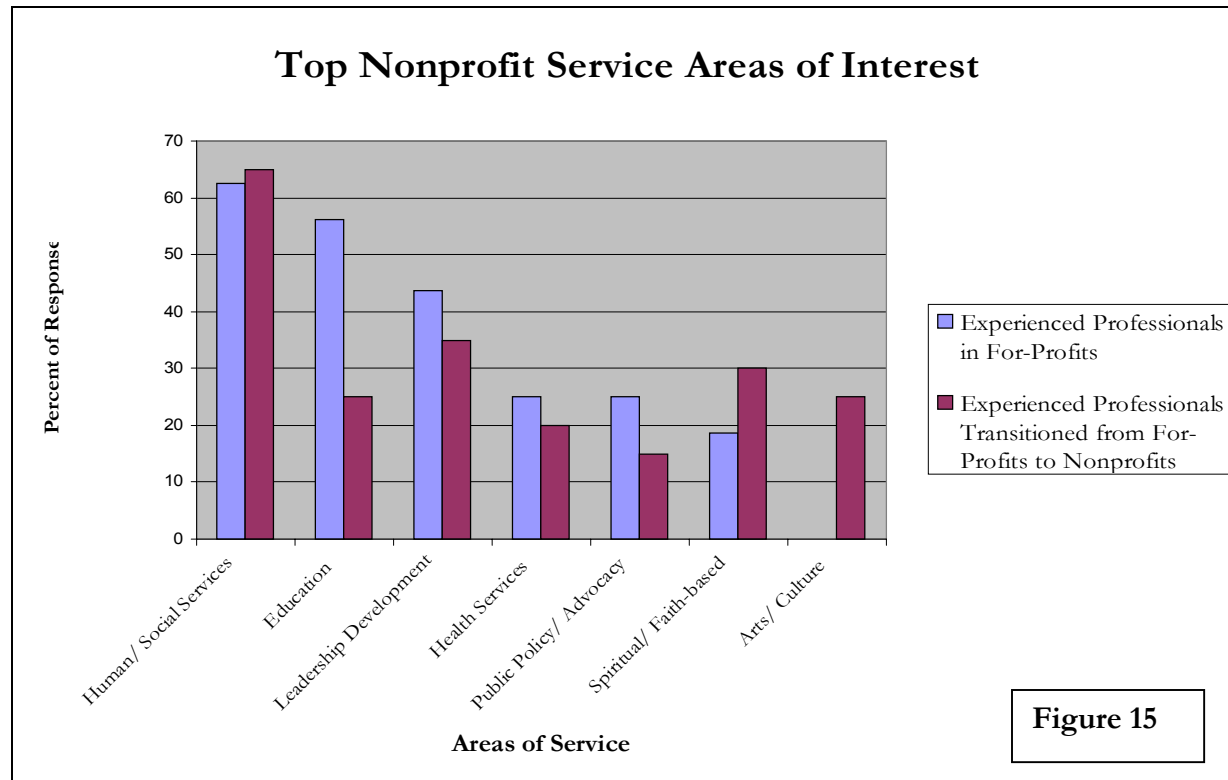


In an open-ended question, we asked both groups what *drove* or motivated them to do work in the nonprofit sector. Experienced professionals considering a move from their current positions in other sectors offered *helping others* and *making a difference* as the top two reasons for a move, while experienced workers who had already transitioned into the nonprofit sector recalled that *using their skills* and *finding meaningful work* were the top two motivators (Figure 14). What is almost as revealing as the reasons why they would or did make such a move are their reasons why not. Earning an income or leaving stressful working conditions in another sector were at the bottom of the list of motivating drivers reported.



Equally remarkable is that both groups reported high levels of job satisfaction in their current (those currently in other sector employment) or last (those transitioned from other sectors to nonprofits) job in the public or for-profit sectors. Seventy-eight percent (A1 group) and 100 percent (A2 group), respectively, reported being very or somewhat satisfied with their other sector jobs. This finding may challenge the skepticism of nonprofit leaders that people are seeking the nonprofit sector out of dissatisfaction and will only be committed to the nonprofit job until a better opportunity comes along in the for-profit or public sector. It may also underscore a widely-recognized success factor in human behavior, that people who are generally satisfied with what they have done in the past are more likely to be satisfied in their future endeavors.

We asked both groups to respond to a list of nonprofit community service areas and identify those they would consider working in. Human and social services were the top choice of both groups with education, spiritual/ faith-based, leadership development, and health services also prominently mentioned (Figure 15).



When asked an open-ended question about what they could or did bring to nonprofit community organizations, the top five responses (among many responses) both groups gave were in order:

**Top Skills/ Qualities Experienced Professionals Bring**

1. Leadership/ management/ organizational skills
2. Financial/ fund development skills
3. Marketing/ communications/ public relations skills
4. Caring for others
5. Willingness to learn

These responses track closely with the organizational needs and expectations identified by nonprofit leaders in Greater Hartford<sup>11</sup> and offer potential future solutions through community asset matching.

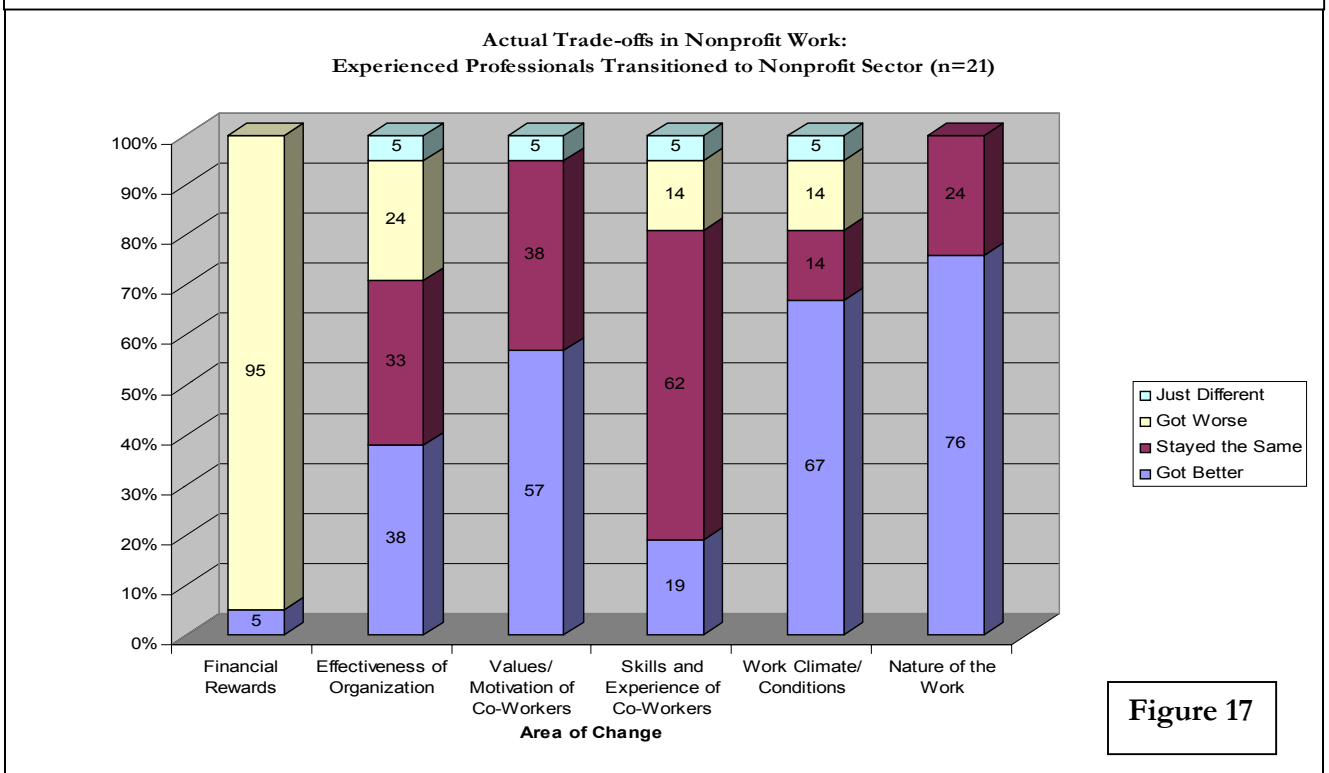
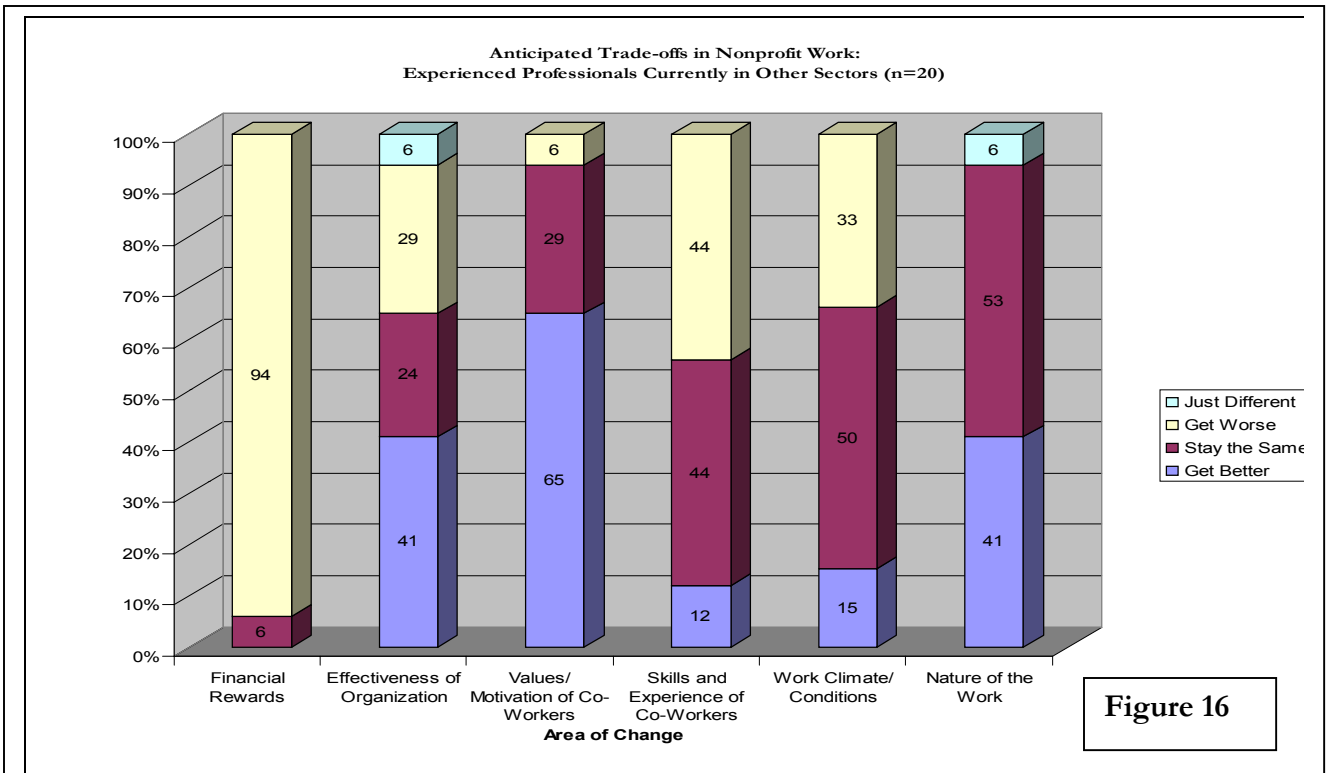
When asked if they knew of an entity or organization that helped match talented and experienced adults with nonprofit community organizations, 42 percent of the people we interviewed from outside the nonprofit sector (A1 group) and slightly more than half of those who had transitioned from other sectors to the nonprofit sector (A2 group) were able to identify one. This suggests that there is a structural gap between the motivations of experienced adults to use their talents in community-based settings and the recognized existence of a resource to help them make that transition.

**Experienced Professionals' and Nonprofit Leaders' Views on Cross-Sector Trade-offs and Compensation**

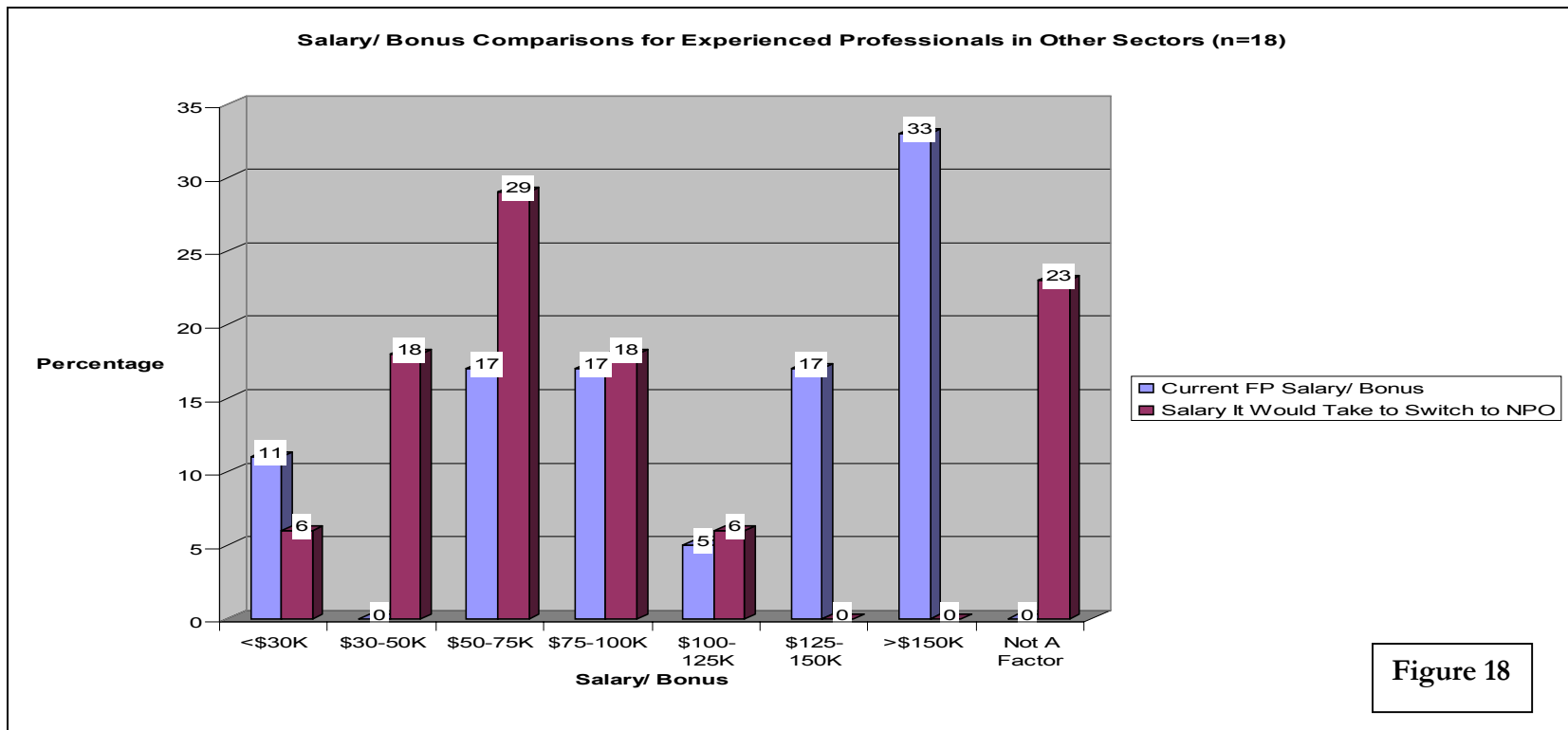
In discussing the potential of boomers bringing their talent and experience to nonprofit organizations, there is often much speculation about the changes or trade-offs they expect to (or actually do) encounter. We asked both subject groups of experienced professionals to respond to a number of areas of potential change to see if there was a consensus of opinion and also to discover any differences in the perception of change versus the actual experience of change. What we found is that there is a high degree of optimism among both groups that the transition from other sectors to the nonprofit world will be (is) the same or will (did) get better on all indicators except *financial rewards*. This study's sample recognizes the generally accepted fact that compensation levels in the nonprofit sector fall short of comparable positions in the private and public sectors. What was interesting in our study is that those people who had already transitioned to the nonprofit sector were nearly twice more likely to see the *nature of the work*, and almost four times more likely to see the *work climate/ conditions* as getting better than those who were projecting what trade-offs they would have to make in such a transition (Figures 16 and 17).

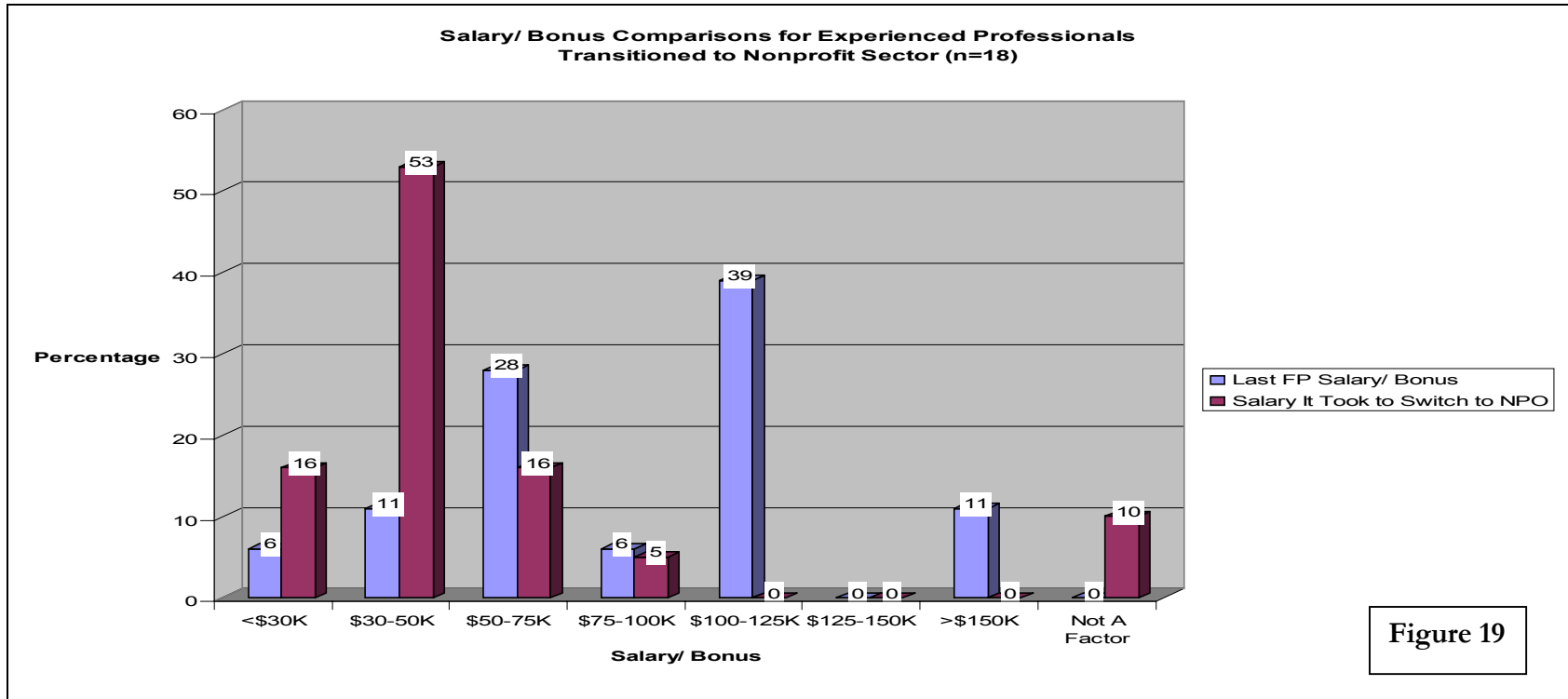
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<sup>11</sup> See "Hartford Nonprofit Executives' Views on Capacity-Building Challenges, Needs and Solutions" in this report, page 49.



Because compensation gaps have been cited as one of the biggest barriers to cross-sector transitions, this study also explored the extent of those disparities between what professionals earned in the public and private sectors and what they could or would need to earn in the nonprofit sector. We found that while the median earning range (full-time equivalent position) for experienced professionals currently employed in the for-profit and public sectors (\$100,000- \$125,000) was slightly higher than the median most recent other-sector earnings for those who have already transitioned to the nonprofit sector (\$75,000-\$100,000), both groups' expectations for nonprofit sector compensation were lower and more in line with what many nonprofits can afford. The median ranges of salary needed by the first (A1) and second (A2) groups were reported as \$50,000-\$75,000 and \$30,000-\$50,000, respectively (Figures 18 and 19).





Equally significant, nearly one-quarter of those we surveyed who are currently in the for-profit or public sectors and 10 percent of those already transitioned reported that financial compensation would not be needed. While national studies have shown that as many as 95 percent of contemporary pre-retirees expect to work in some capacity during their retirement years, nearly half (49 percent) said they would work in retirement even if they were paid little or nothing at all.<sup>xiii</sup>

The responses from nonprofit leaders to a similar question reveal a less-than-significant gap between what transitioning experienced professionals need and what nonprofit leaders would pay. Overall, the median salary range nonprofit leaders say they would pay (based on four different job classifications offered) was \$40,000-\$50,000. The breakdown of median salary ranges for the four job classifications were as follows: *executive/ senior management* (\$50,000-\$70,000); *technical/ administrative* (\$40,000-\$50,000); *program/ project director* (\$40,000-\$50,000);

and *direct service* (\$30,000-\$40,000).<sup>12</sup> As the comparison chart (Figure 20) shows, 93 percent of the nonprofit leaders' responses were fairly evenly distributed over the four salary ranges up to \$70,000. One-quarter of the experienced professionals currently in the for-profit or public sector, and five percent of those who had already made the transition reported they needed to receive or did receive a salary in excess of \$70,000 (Figure 20).

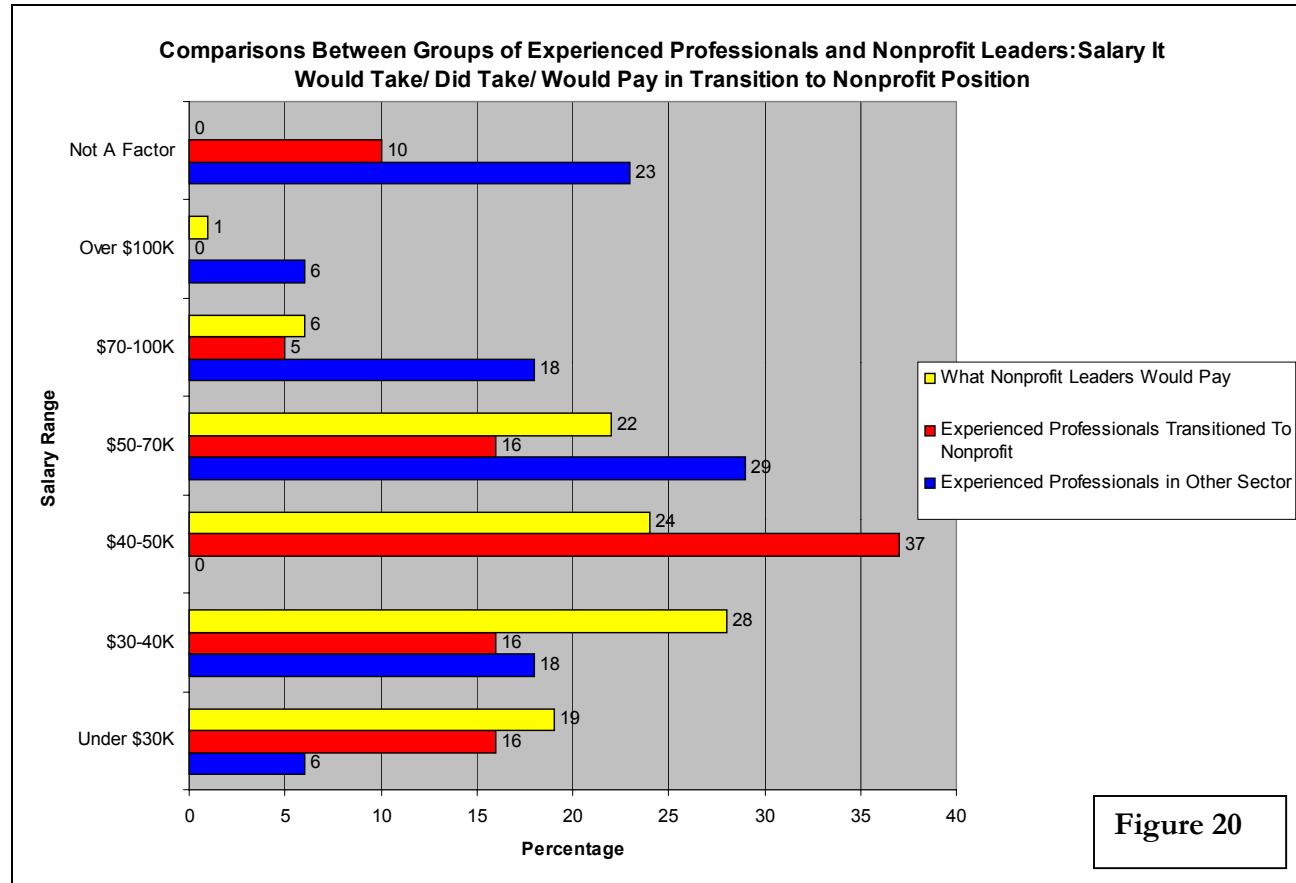


Figure 20

<sup>12</sup> More data from nonprofit leaders' responses to questions about what they would pay for different job classifications can be found on pages 51-53 in this report.

These findings are more remarkable when put in context of comparative wage data between the sectors. In an employment project completed for the Connecticut Association of Nonprofits<sup>xiv</sup>, annual nonprofit wages were estimated at \$33,540, 24 percent less than annual public sector wages (\$41,496), and 41 percent less than annual private sector wages (\$47,476). While the salary range responses in our study were skewed toward more highly skilled managerial and technical positions and therefore higher than those in the CAN Employment Project, there is less differential between the sectors, possibly the result of experienced professionals' willingness and ability to make financial trade-offs in a transition to the nonprofit sector.

## Related Research Literature on Boomers and Retirement

**“If 57 million of us decided to raise up the values of belonging in a society suffering from the pains of isolation, to give something back because we have been given so much, and take risks to age maturely and cooperatively with all generations- we would change America in ways we could only have dreamt about in the 1960s.”<sup>xv</sup>**

**Jim Gambone and Erika Whittlinger, Partners, Refirement, Inc.**

A comprehensive review of the current social research and study of the different generations reveals that the boomers are a diverse group; however, there emerges a set of core values shaped by shared life experiences and historical contexts that describes this generation as a whole and in their diversity. There is emerging evidence that the boomer generation is looking to lead lives of greater meaning and purpose, often involving civic engagement and/ or using their skills and talents to make a difference in their communities.<sup>xvi</sup>

### **Civic Engagement**

With increasing frequency, individuals in their 40s and 50s are seeking out more fulfilling works of service; life activities that they can be passionate about- either as unpaid acts of volunteerism, as paid employment, or both. Bob Buford (1994) posits that many of these individuals have achieved “success” and may be in a position to accept less material compensation for increased “significance.” Bill Shore (1999) writes, "Right now, the potential to bring about lasting change is greater than ever before, and so is the need." He describes this group of mid- and later career professionals as wanting "to 'give something back,' to find a way to contribute that will be meaningful and make a difference. What they want to know is *how*."<sup>xvii</sup>

Civic Ventures, a nonprofit think-tank dedicated to the civic engagement and social renewal of older adults, recently commissioned a social marketing research study of Boomers and the changing face of retirement. Among many fascinating findings, the study identified one challenge of the transition to retirement as the loss of “relationships with a purpose.” It concludes that while purely social relationships have expanded in retirement, these developments cannot replace the kind of connection that comes from working together with others to achieve a common goal.<sup>xviii</sup>

An AARP/ Roper Starch Worldwide, Inc. national telephone survey of “leading edge” boomers aged 45-54 conducted immediately before and after the terror attacks of September 11, 2001 revealed that 6 in 10 felt “a responsibility that goes beyond our own life and our own family, and we seek meaning by helping other people.” Eight in 10 harkened back to their days of social activism and wished they could do good deeds for other people. Jim Parkel, current president of the Board of AARP, says, "The old connotation of retirement is, you worked,

you retired, you played golf and took cruises. I don't think our members are doing that, number one. And number two, if they volunteer and get involved in life ... do new exciting things, that's not retirement." <sup>xix</sup>

Based on interviews with 2000 Boomers over an eight year period, James Gambone describes the six key values of the generation as: sense of belonging; giving something back; taking risks; entitlement; expectations of a good life; and experimentation. He is optimistic about the contributions Boomers will make to society by building intergenerational solutions to community issues. <sup>xx</sup>

Carl Van Horn, director of the Rutgers' Heldrich Center for Workforce Development says, "Individuals will be looking to retirement as an opportunity to improve their balance of life. Although Americans complain about wanting a balance between their jobs and families, they like to work, and ... retirement is an opportunity to improve that balance." Jack and Phoebe Ballard describe this period of life as an opportunity to rebalance work, learning, and leisure/play. A couple in their mid-70s, they have personally challenged the traditional retirement definitions of retirement of material wealth, leisure and consumption replacing these instead with the pursuit of passion, meaning and purpose, and vital relationships. <sup>xxi</sup>

## **Work**

Interspersed with themes of *giving back*, *making a difference*, *freedom and choice*, and *purposeful relationships*, are economic security concerns and the desire to use one's accumulated skills and experiences. This has implications for the changing face of work for older adults, whether by necessity or by choice.

Ken Dychtwald, working with Harris Interactive and sponsored by AIG SunAmerica, completed the *Re-Visioning Retirement* project, a pioneering, comprehensive study of what retirement is today — and what it is transforming into. In nationwide interviews of a cross section of over 1000 adults age 55 and older, the study found that the majority of retirees and pre-retirees do not regard retirement as an extended vacation or a time of rest and relaxation. Rather, they see it as a new, active stage of their lives characterized by continued personal growth, personal reinvention, and new beginnings in work and leisure. And rather than seeking retirement "security," new generations are in search of a new vision of retirement "freedom." <sup>xxii</sup>

Longer-term and recent attempts to understand and describe the diversity of the Boomer generation at midcourse and the implications for work have shown similar results. <sup>xxiii</sup> American boomers anticipate working in their retirement years whether they have to or not. The question is *how* and *under what terms and conditions?*

What are often understated are the changing workplace realities that Boomers have been a part of for much of their work lives. Plant closings and corporate "rightsizings" are representative of a highly volatile, uncertain, and changing marketplace where job security and

company loyalty, the foundations of the traditional employment compact, are experiences of an earlier generation. On top of that, for some Boomers, there exists a growing schism between what their employers ask them to do or be and who they are. Bill McKendree, president of The Clarion Group, a leading U.S. organization consulting firm, refers to this phenomenon as *The Container Effect*. He says:

“The long-standing corporate quest for profits and shareholder return has been overshadowed by an upwelling cry for greater purpose. Many executives and employees now find themselves questioning whether what is right for the company is right for them ... When business goals such as profit, speed, growth, efficiency, customer service, and shareholder return are accepted as values and guiding principles, a fundamental disconnect begins to develop between what employees know intuitively and what they want to believe for the sake of the company.”<sup>xxiv</sup>

Boomers have honed the arts of “re-careering” and work-family balance, adapting to unpredictable business trends, and changing personal and family needs over the life span, with effective, if not perfected, coping strategies. As a generation, they will change jobs, even careers, more than any other generation in history. They are likely to push upward the average age and the sheer numbers of older Americans in the workforce to levels never seen before. Boomers are the pioneers ushering in a new era of cyclic careers over the lifespan.<sup>xxv</sup>

It is clear that the Boomers’ drive to work is influenced by a number of factors including the need for income, for self-esteem, for a sense of achievement or contribution, for social connection, for meaning and passion, and for fun. Above all else, experts who have studied this transition seem to agree with the conclusions of Joel Savishinsky’s research: “What many emphasized was the element of control- that retirement had given them the freedom *to* work, but at their discretion, rather than the freedom *from* working in an absolute sense. Work had become more of a choice and pleasure than a duty.”<sup>xxvi</sup>

## NONPROFIT ORGANIZATIONS

**Nonprofit organizations are based on “a faith in the capacity of individual action to improve the quality of human life.” They “embody...a deep-seated commitment to freedom and individual initiative and an equally fundamental realization that people live in communities and consequently have responsibilities that extend beyond themselves.”<sup>xxvii</sup>**

**Lester Salamon, *Nonprofit Sector Researcher, Educator, and Policy Maker***

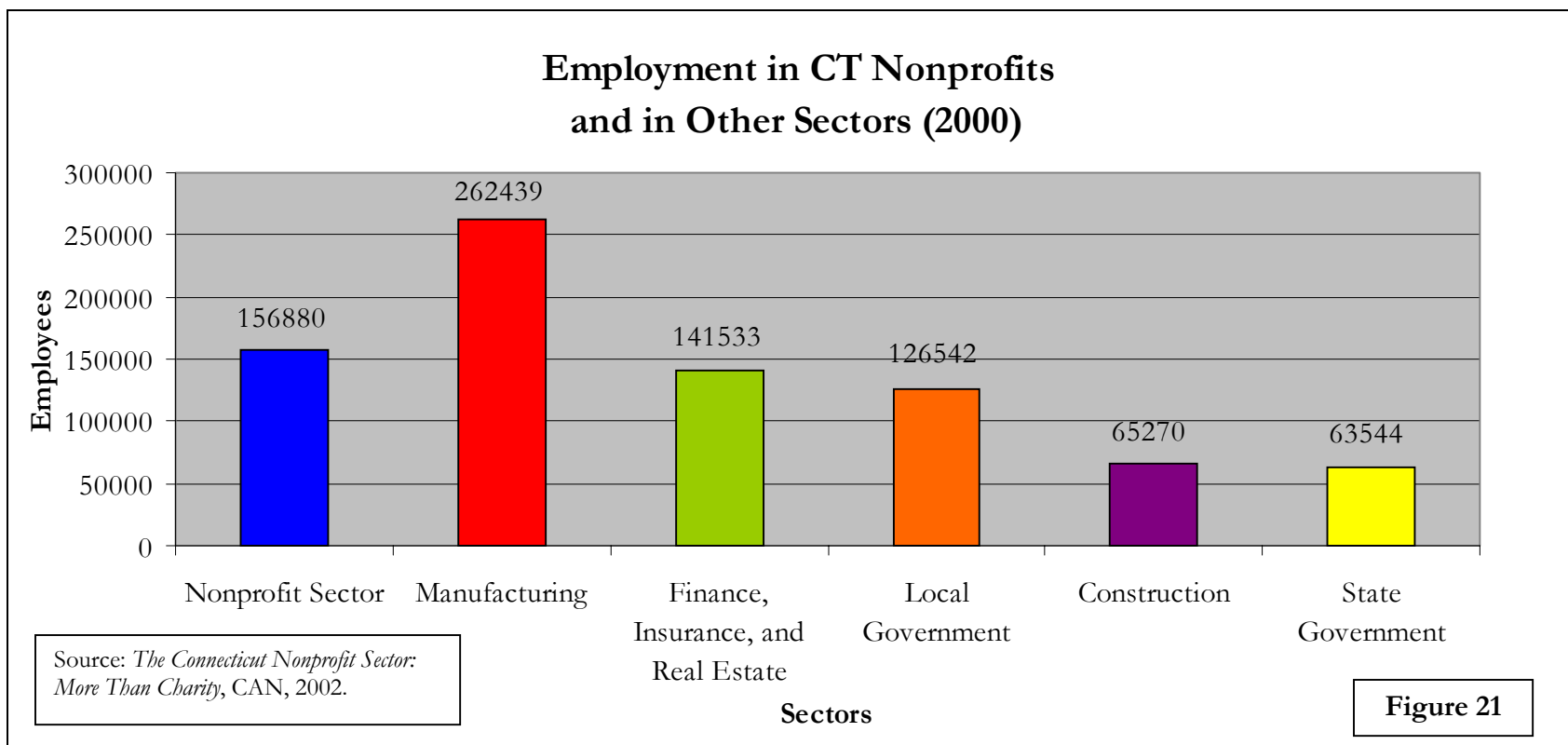
This study explored the views, experience and ideas of nonprofit leaders in Greater Hartford related to their organizational challenges, workforce trends, and the potential for the expanded engagement of experienced professionals from outside the nonprofit sector. We found nonprofit leaders to be quite receptive to the idea of bringing new sources of talent into their organizations, and many gave examples of related success stories. Even more impressive was the passion they demonstrated when talking about the importance of their organization’s work, the increasing competitive challenges they face, and the creative and tireless ways they go about conducting their business.

### **The Nonprofit Landscape in the U.S., Connecticut, and Hartford County**

The nonprofit sector is a thriving, growing, and indispensable part of the American economy and its social, educational, health, and cultural services infrastructure. Due to the large number of unincorporated nonprofits, it is hard to gauge the exact number of nonprofit organizations in the United States. Conservative estimates put the number at 1.2 million as of the mid-1990s, not including religious congregations. As of 1998, these organizations employed 11 million paid workers, or over seven percent of the nation’s workforce. An additional 5.7 million full-time workers are engaged as volunteers in nonprofits. “With volunteer labor included, employment in the nonprofit sector, at 16.6 million, approaches that in all branches of manufacturing combined (20.5 million)... Most of this nonprofit employment is concentrated in three fields- health (43%), education (22%) and social services (18%).”<sup>xxviii</sup>

Every community is dotted with vital nonprofit programs and services from hospitals and universities to museums and zoos; daycare centers to child and family service organizations; performing arts centers to neighborhood and community development groups. Nonprofit organizations add to the quality of life for all in our communities while attending to the special needs of those most fragile and vulnerable members.

In Connecticut, excluding private foundations, religious organizations, and those not required to report, there were 4048 reporting charitable nonprofits that were tax-exempt under Section 501 (c)(3) of the IRS code in 2000 ( The actual number of 501 (c)(3) organizations in Connecticut registered with the IRS including private foundations was estimated at 11,606 in 2002; this includes nonprofits that are registered with the IRS but are not required to file because they are so small.) These organizations employed 156,880 people representing 9.4% of the state’s labor force<sup>xxix</sup> (Figure 21).



In Hartford County alone, there were 983 charitable reporting nonprofits employing over 40,000 in 2000. This employment level, representing 8.2 percent of total employment in the region, is higher than the national average but lower than the state average.

The closer look at the range of sizes of nonprofit organizations in Connecticut tells an interesting story. The predominant share of nonprofit budgets is being generated by a handful of large nonprofits, while most are small-budget organizations. In 2002, only 7.5 percent of Connecticut's nonprofits had annual expenditures over \$5 million but these organizations accounted for over 91 percent of total assets and 86.2 percent of total expenditures. By contrast, 79 percent of Connecticut nonprofits had annual expenditures under \$1 million.<sup>xxx</sup>

### National, State, and Regional Workforce Trends

**“...Because the Region has an aging population, we also have an aging workforce. In 1990, 49.3 percent of our population was aged 35 and older. In 2000, this age group made up 54.6 percent of our population. This raises concern that many of our most skilled workers, especially those in technical jobs, are aging out of the workforce. The leading edge of the baby-boom generation is made up of people aged 45-54 years in 2000. This segment of our population numbered 103,205 in 2000, and will start to reach retirement age in the next decade.”**

***Trends Shaping Our Region: A Census Profile of Connecticut's Capitol Region,  
Capitol Region Council of Governments, January 2003***

Labor shortages have become commonplace in nearly every American industry but particularly in the helping professions, i.e. nursing, teaching, and human services. These shortages have been exacerbated in times of economic boom when workers have greater opportunities for growth and advancement in other industries. However, even in periods of economic recession, recruitment and retention of a skilled and committed workforce is the number one challenge for American organizations, whether for-profit or nonprofit.

Fueled by the aging of the 76 million boomers, the American workforce now has more workers over age 40 than under age 40. In the next five years, the fastest growing segment of the American workforce for both men and women will be workers ages 55 to 65. It is estimated that the percentage of people 55 years and older in the U.S. workforce will increase to 20 percent by 2020.<sup>xxxi</sup>

Due to the baby bust of the late 1960s and 1970s, there is a woefully inadequate supply of replacement talent. The U.S. Labor Department estimates that the number of workers ages 25 to 40 will decline 12 percent by 2005. Labor force participation by people over 55 will need to increase by 25 percent for the United States to maintain their current levels of productivity.<sup>xxxii</sup>

A workforce analysis in Connecticut shows similar trends. Despite the loss of over 38,000 jobs in Connecticut during the current recession, and the possibility of still more to come, a recent state labor department report projects 150,000 new jobs over this decade.<sup>xxxiii</sup>

Closer examination of the findings reveals that:

- Connecticut has experienced the third largest decline in the nation of people aged 18-34 over the past decade, losing nearly 200,000 or 22 percent of its potential workforce population. These individuals collectively represent the replacement workforce for the Boomer generation.
- Census population projections indicate that the pool of 18 year olds will begin declining again in 2007.
- Half of the state's new jobs will require some level of post-secondary training or education; growth rates for these jobs are more than double that of occupations with minimal training requirements.

Even more alarming are the projected growth rates in several job areas that were also identified as high need areas by nonprofit leaders interviewed in this study. The following job areas far exceeded the projected general job growth rate of 8.6 percent in Connecticut for this decade: marketing managers (23%); public relations managers (24%); public relations specialists (25%); financial managers (11%); financial analysts (18%); computer support specialists (68%); network and computer system administrators (58%); database administrators (51%); social and community service managers (11%); social and community service direct care workers (21%); healthcare support (23%); and childcare workers (9%).

The current workforce shortages in critical services commonly provided by nonprofit organizations, challenging as it is, projects to only get worse in the coming two decades unless dramatic and effective strategies are employed to slow and reverse the trend. The workforce crisis in nonprofit human services organizations, and the conditions under which they operate, is described in a 2003 study completed by Paul Light at the Brookings Institute's Center for Public Service for the Annie E. Casey Foundation's Human Services Workforce Initiative. Employee burnout, turnover, inadequate training and support, and poor reward and recognition programs plague the industry.<sup>xxxiv</sup>

Human service workforce challenges also exist at the leadership and managerial levels. In a recent public sector Commissioners Roundtable meeting convened by Child Welfare League of America, it was reported that as many as 55 percent of current managers and supervisors will retire in the next five years.<sup>xxxv</sup> An informal survey of private, nonprofit family service agencies in Connecticut revealed that one-third of the current CEOs/ senior executives will be eligible for retirement in five years, 58 percent in 10 years, and 88 percent in 15 years.<sup>xxxvi</sup>

Equally foreboding for nonprofit leaders in general is a phenomenon Lester Salamon cites, “Executive directors who came into the field to pursue the social missions of their agencies find themselves expected to function instead as aggressive entrepreneurs leading outward-oriented enterprises able to attract paying customers, while retaining the allegiance of socially-committed donors and boards, all of this in the context of growing public scrutiny and mistrust.”<sup>xxxvii</sup>

The ever-intensifying pressure cooker that is the nonprofit leader’s existence together with the projected retirement trends of the sector’s current leaders raises a question about where the next generation of leaders will come from. More effective succession planning, grooming talented and passionate people for leadership roles, and increasing the technical and mentoring support to executives are among the strategies that a leading national technical assistance provider advocates in a recent study of nonprofit leaders.<sup>xxxviii</sup>

### **Hartford Nonprofit Executives’ Views on Capacity-Building Challenges and Needs**

As we expected, Greater Hartford’s nonprofit leaders, quite like their state and national colleagues, cite financial resources and fund-raising as their number one organizational challenge or need by a 2:1 margin over the next rated challenges: public relations/ communications; management/ administrative infrastructure (finance, human resources, and information technology); marketing; and multi-skilled personnel. When asked what competencies, qualities, and skills they sought in their personnel, the top attribute by a 2:1 margin is what the author calls the “heart-value cluster” of commitment to mission, compassion, and belief in change; this is followed in order by creativity/ flexibility; public relations/ communications skills; information technology skills; fund development skills; self-initiative/ risk-taking; and other-oriented/ open to listening and learning.

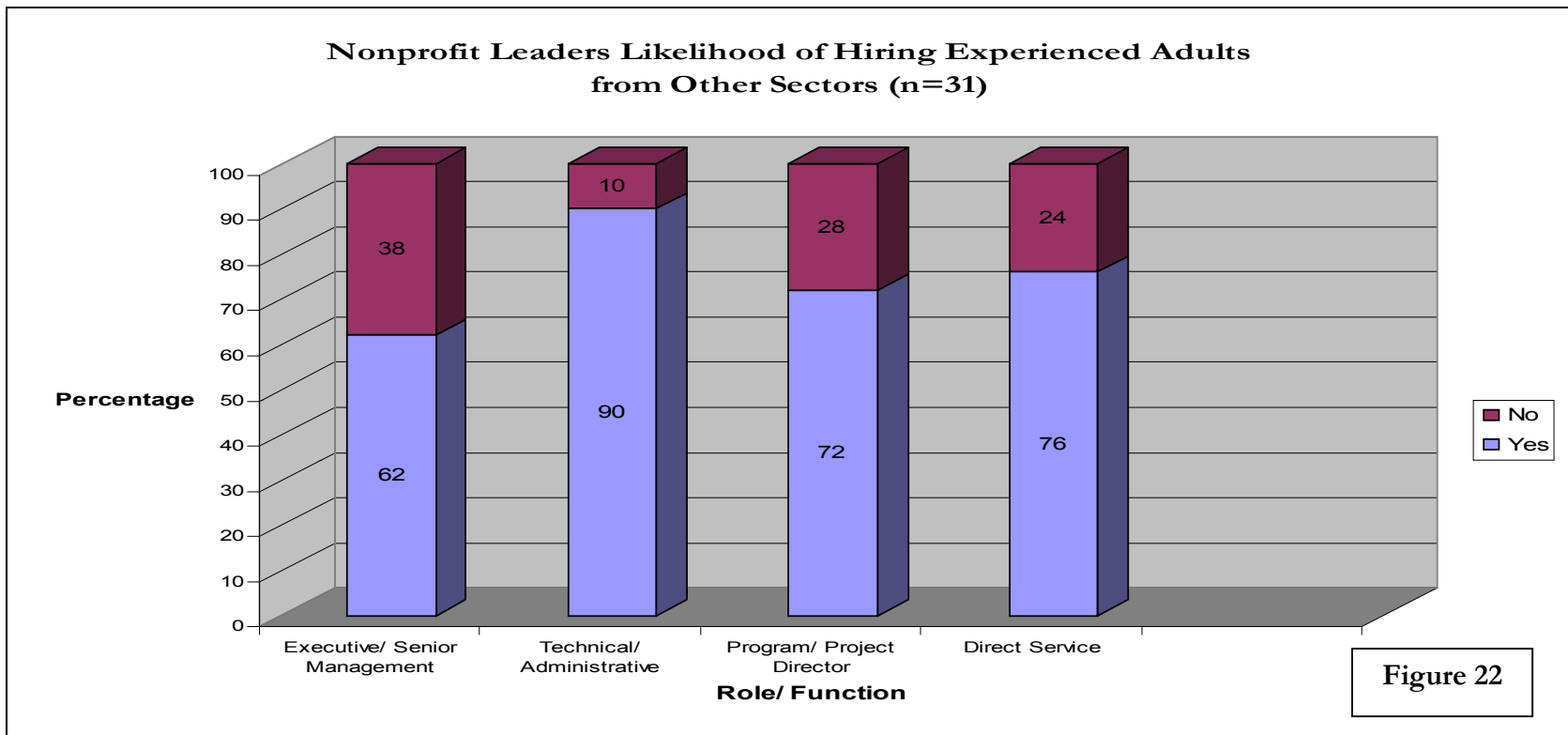
There exists a valuable kernel of information embedded in these data. While people outside the nonprofit sector and nonprofit leaders alike recognize there is a need for specific technical, operations, and managerial skill sets, nonprofit leaders believe it all begins with a belief in, motivation, and commitment to the organization’s mission. Ironically, it is *mission* or the search for meaning and purpose that drives Boomers to nonprofit organizations but questions about *sustained commitment* to the mission that seem to trouble nonprofit leaders the most about boomers interested in transitioning to the sector. With each group seeking an alignment of values and action, there seems to be fertile ground to explore the mutual benefits that greater intersection between these two groups could bring.

### **Hartford Nonprofit Executives’ Views on Engaging Experienced Professionals from Other Sectors**

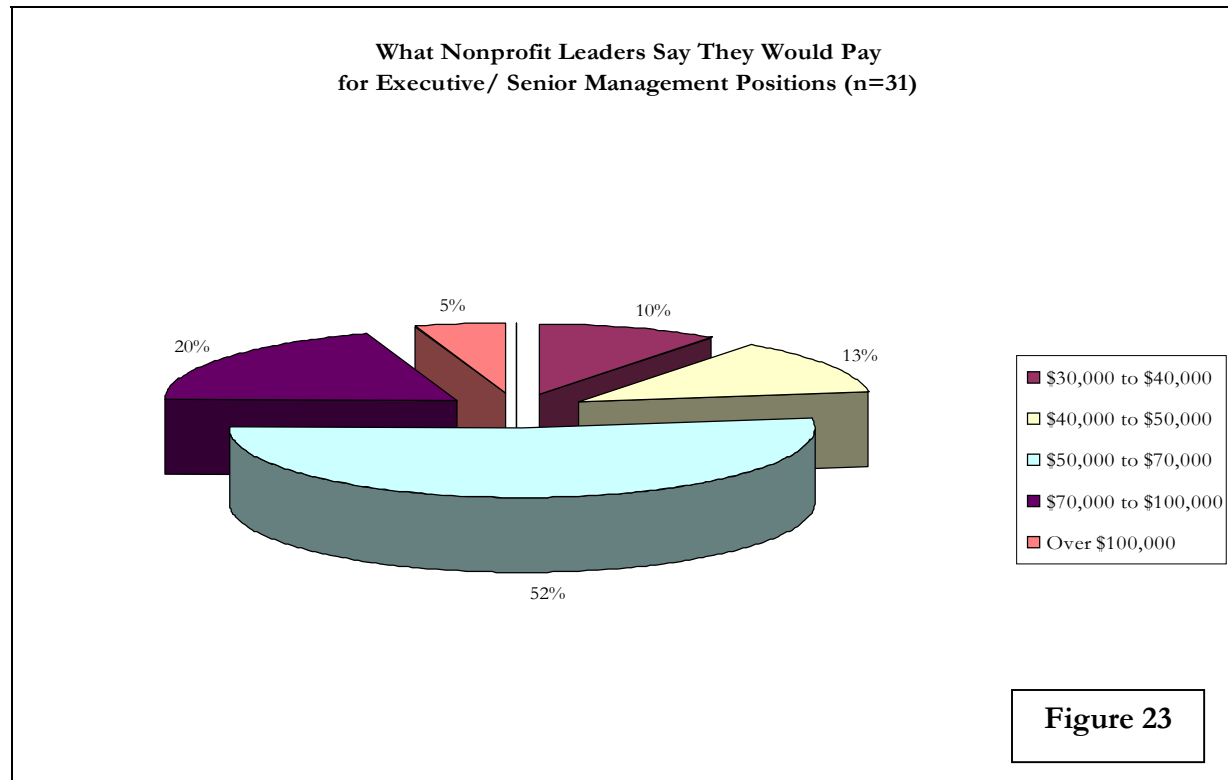
Nonprofit leaders participating in this study overwhelmingly affirmed their openness to engaging or hiring experienced adults from other sectors in their organizations. Ninety-seven percent of the nonprofit leaders surveyed report that they would be “likely to engage/ hire a

Boomer with other sector experience.” Ninety-three percent report they would hire/ engage experienced adults as paid employees, 86 percent as contract or temporary employees, and 97 percent as unpaid volunteers.

We then asked those who responded affirmatively to the likelihood of engaging experienced professionals from other sectors with pay whether or not they would be likely to hire them in a number of job classifications: executive/ senior management, technical administrative, program/ project direction, and direct service. As Figure 22 shows, nonprofit leaders reported that they are highly likely to hire them in all these roles. Nonprofit leaders reported that their reasons for not hiring experienced adults from other sectors had most to do with the lack of sector-specific knowledge and experience and/or the absence of credentials and licenses that are requirements in some nonprofit fields.



Figures 23, 24, 25 and 26 provide a picture of what nonprofit leaders in this study reported they would pay for each of the four job classifications. Comparisons with what experienced professionals from other sectors say they would need to be paid have been provided earlier in this report on pages 39-40.



What Nonprofit Leaders Say They Would Pay  
 Technical/ Administrative Positions (n=31)

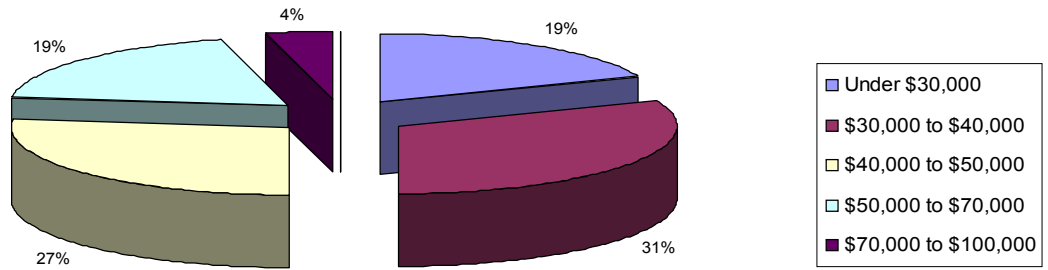


Figure 24

What Nonprofit Leaders Say They Would Pay  
 Program/ Project Directors (n=31)

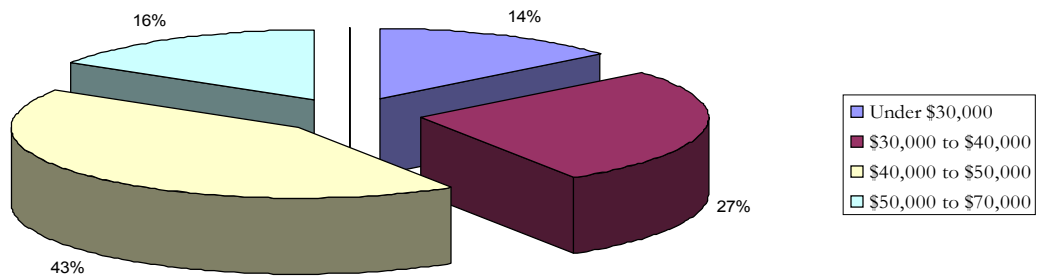
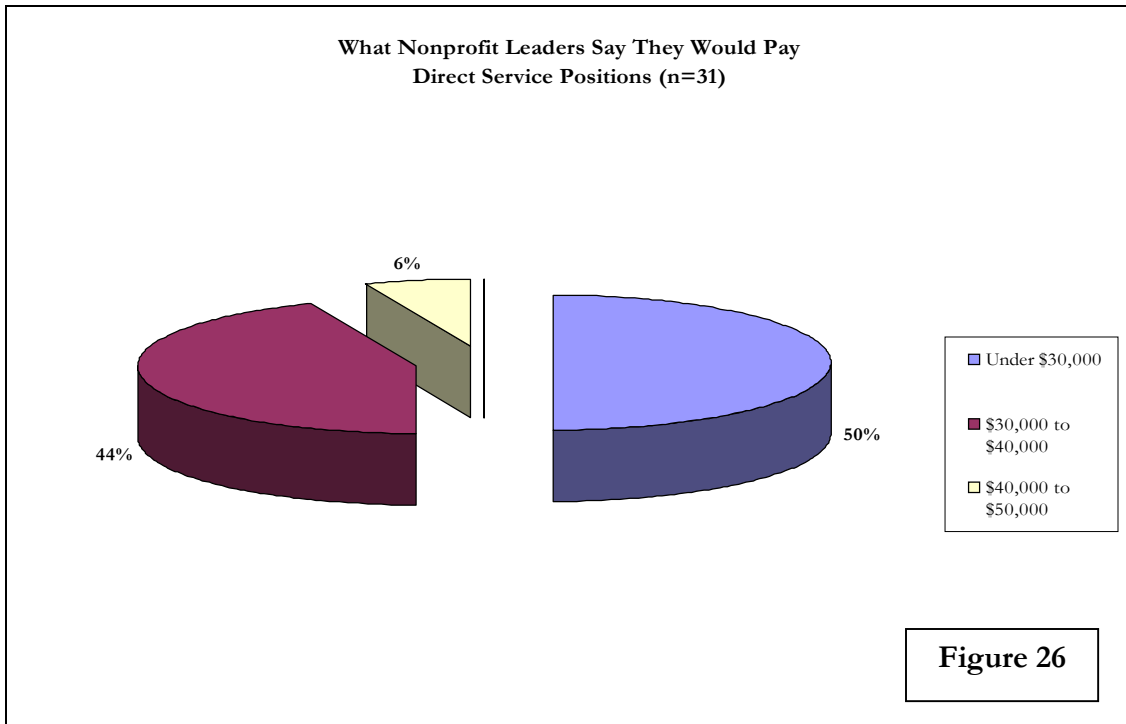
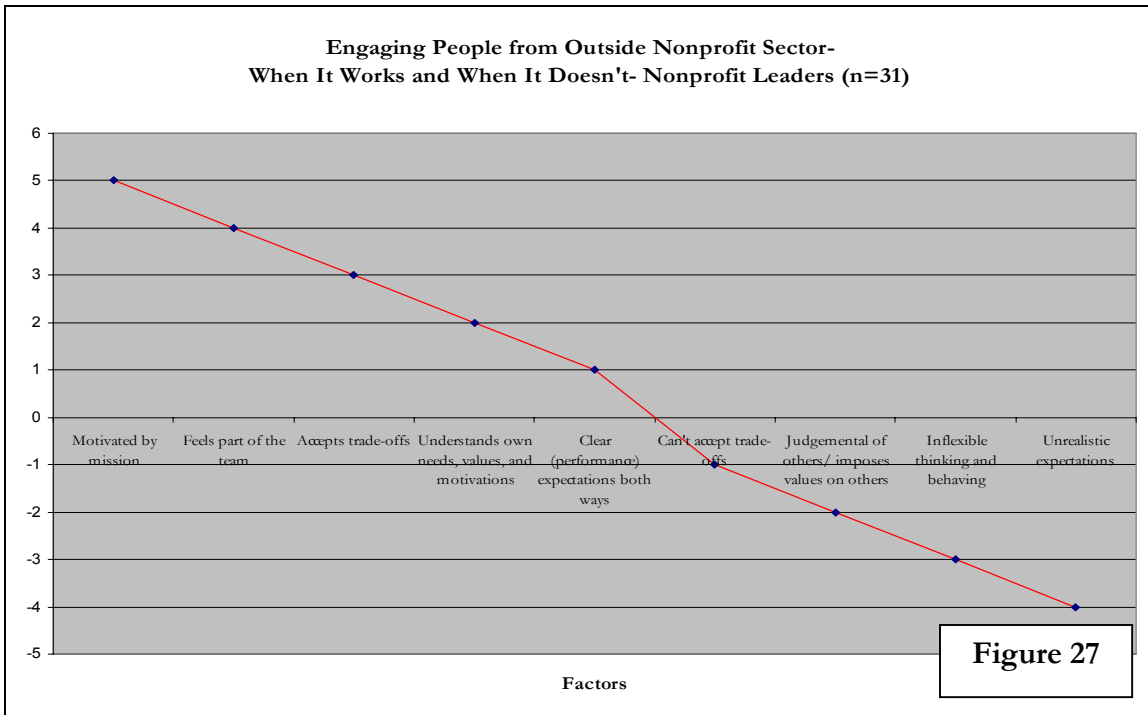


Figure 25



Since everyone we interviewed knew people who had transitioned from the public or for-profit sector to work in the nonprofit sector, we asked nonprofit leaders to describe the factors involved when people do it successfully and factors when it does not work out. Quite consistent with life/career transition theory and practice, the top success factor they identified is being motivated to go to something as opposed to away from something; other success factors include connecting to a team, accepting trade-offs, self-knowledge, and clear expectations (Figure 27).



A follow-up question asked nonprofit leaders their view on whether the age or experience of the worker has an impact on successful outcomes; two-thirds of those surveyed believed that age or experience does positively affect results.

Finally, nonprofit leaders were asked about their knowledge and use of third parties or brokers in the recruitment of paid and unpaid workers. Nearly two-thirds (61%) knew of organizations that match people with nonprofit organizations as volunteers or as employees but few indicated that they had actually used these services. The cost of and satisfaction with brokering services were cited as two primary reasons nonprofit leaders did not use them. Like the experienced adults we interviewed about finding work, nonprofit leaders reported that informal networking was their primary and most successful method for recruiting key staff and volunteers. However, 63 percent of the nonprofit leaders interviewed reported they would definitely use a brokering resource in the future if it was designed to meet their human resource needs; another 12 percent indicated that they would consider using such a resource.

## **BROKERS**

People interviewed from the broker community represented a wide range of organizations, sizes, and purposes with divergent perceptions of the issues we studied. Many of their aggregate responses are offered for comparison purposes in data presented elsewhere in this report. As expected, those involved in volunteer placement and management largely work independent of those whose primary function is to help people with career or employment related matters.

Several trends and themes emerged from these interviews:

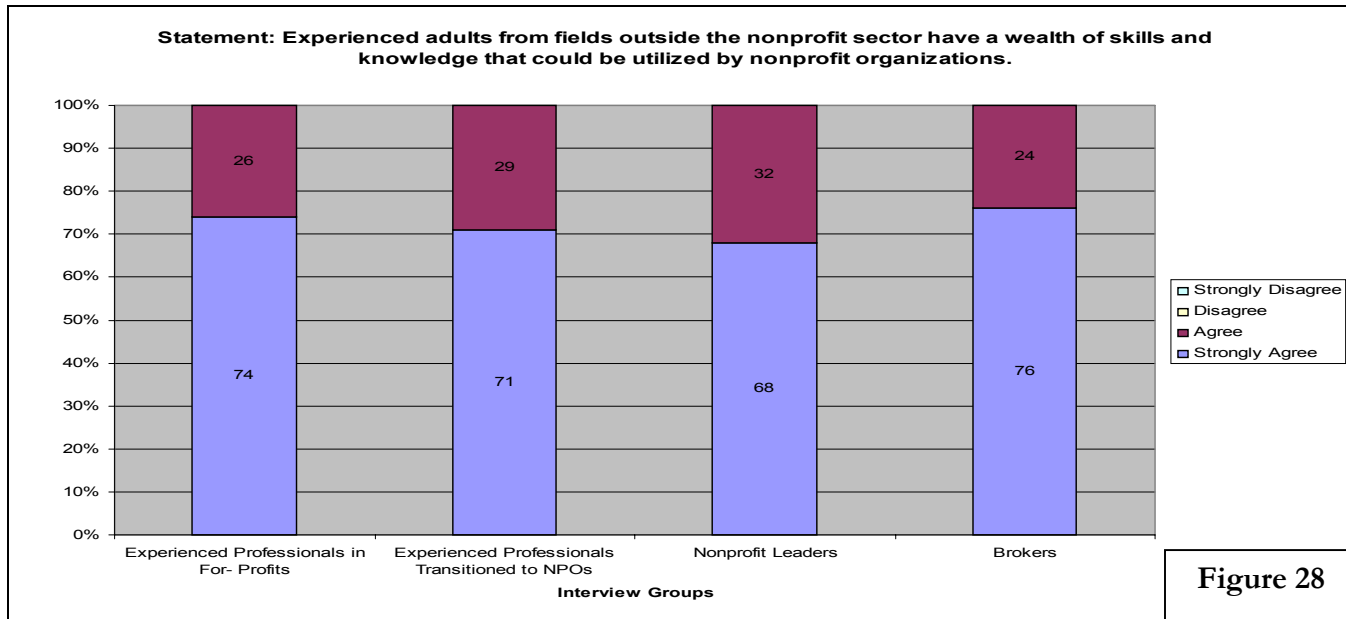
- Many volunteer organizations, whether an internal department supporting a larger institution or a program serving the community, have more people interested in volunteering than opportunities to offer. They also indicate that finding “meaningful” or “skilled” positions can be difficult.
- Clear job responsibilities, performance expectations, and accountability measures along with meaningful recognition programs result in higher satisfaction for all parties involved.
- While human resource and volunteer services departments historically have operated separately within the same institution, there is a trend locally and nationally to merge these functions and to see them as a continuum of work opportunities and interdependent upon one another.
- Relations with the corporate community vis-à-vis volunteerism have ebbed and flowed. In times of economic pressures and greater productivity demands, some report less corporate support of employees to engage in community projects.
- Many volunteer organizations that rely heavily on older volunteers see the baby-boomers coming, are thinking about how they might be used, but have taken limited steps to design new opportunities that might attract them.
- Funding limitations and restrictions constrict the extent of outreach to nonprofits, to the corporate sector, and to potential volunteers that volunteer managers can do.
- Corporate outplacement firms and career transition coaches are hearing their clients talking more about being motivated to work in the nonprofit sector and finding more meaning and purpose in their work. They attribute the desire to have more direct impact to a number of factors including the growing instability and uncertainty in the world around us, disillusionment with the corporate sector, and life stage.
- Tools and processes, both high-tech and high-touch, are available and useful to assist individuals in transition plan for their future.

## ATTITUDES AND PERCEPTIONS ABOUT CROSS SECTOR EXCHANGE

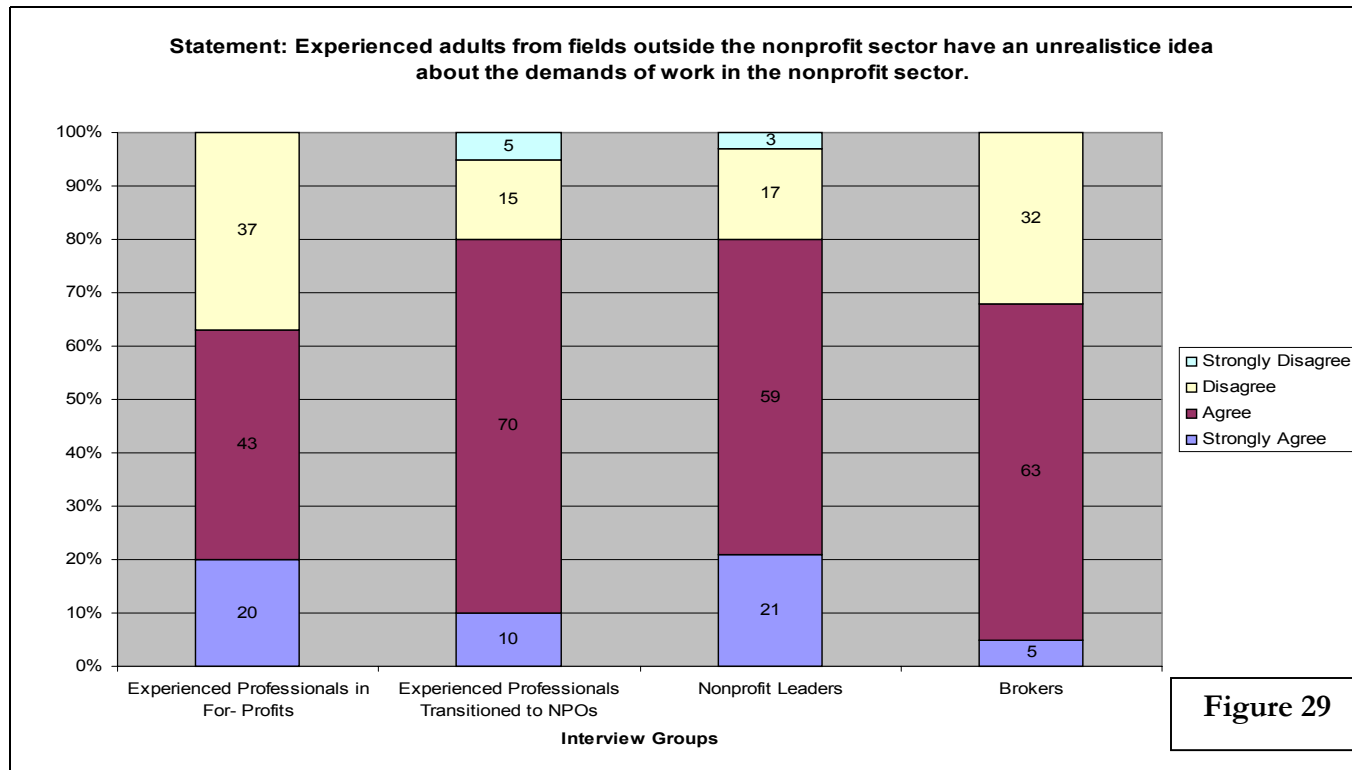
As part of this study, we created six statements that embody common beliefs, perceptions, or attitudes regarding the opportunities and challenges affecting the increased engagement of experienced adults from other sectors in the nonprofit sector. We intended these statements to identify areas of greatest conflict and barrier between the sectors as well as illuminate the areas of confluence around which future consensus could be built. By comparing response from all four groups, we hoped to identify where, if any, major disagreements may exist.

The results that follow demonstrate extraordinary consensus among the four groups studied. Whether agreeing or disagreeing with a statement, each group tracked closely with the others, with a few minor exceptions. The marginal differences described may have future implications for screening, selection, and orientation activities for adults transitioning between the sectors.

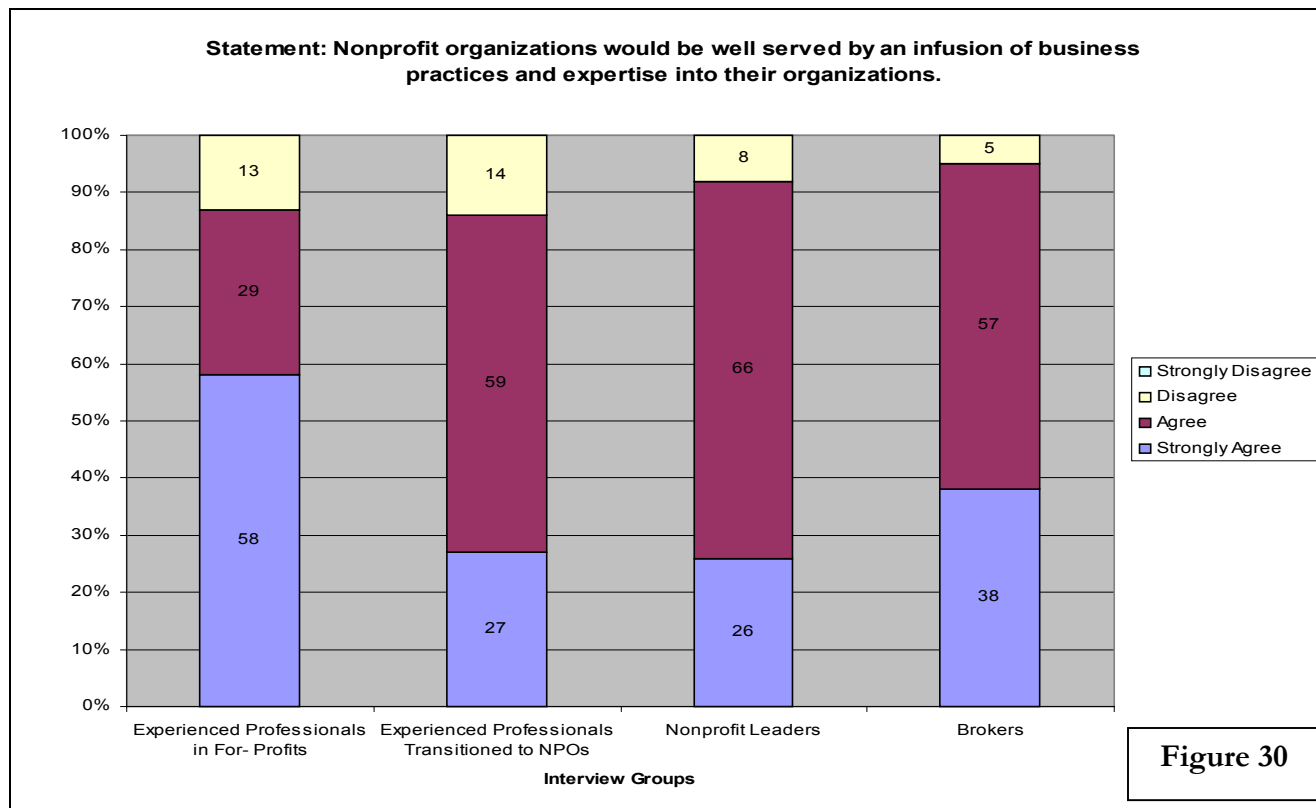
There was unanimous agreement with the statement: *Experienced adults from fields outside the nonprofit sector have a wealth of skills and knowledge that could be utilized by nonprofit organizations* with at least two-thirds of each group strongly agreeing (Figure 28).



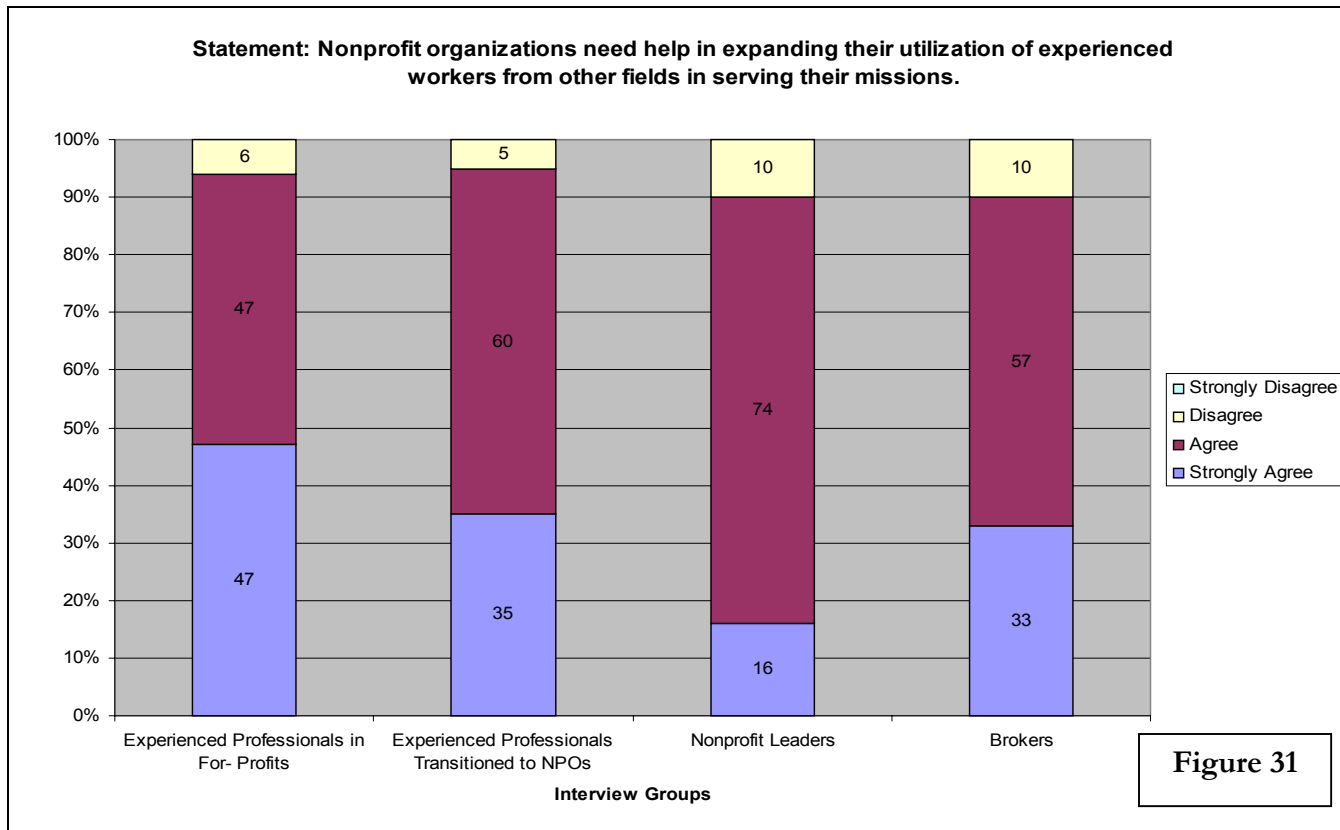
There was clear agreement on the statement: *Experienced adults from fields outside the nonprofit sector have an unrealistic idea about demands of work in the nonprofit sector.* About one-third of the responses from the experienced professionals outside the nonprofit sector and from the brokers disagreed with this statement at a rate nearly double that of the experienced professionals already transitioned to the nonprofit sector and the nonprofit leaders (Figure 29).



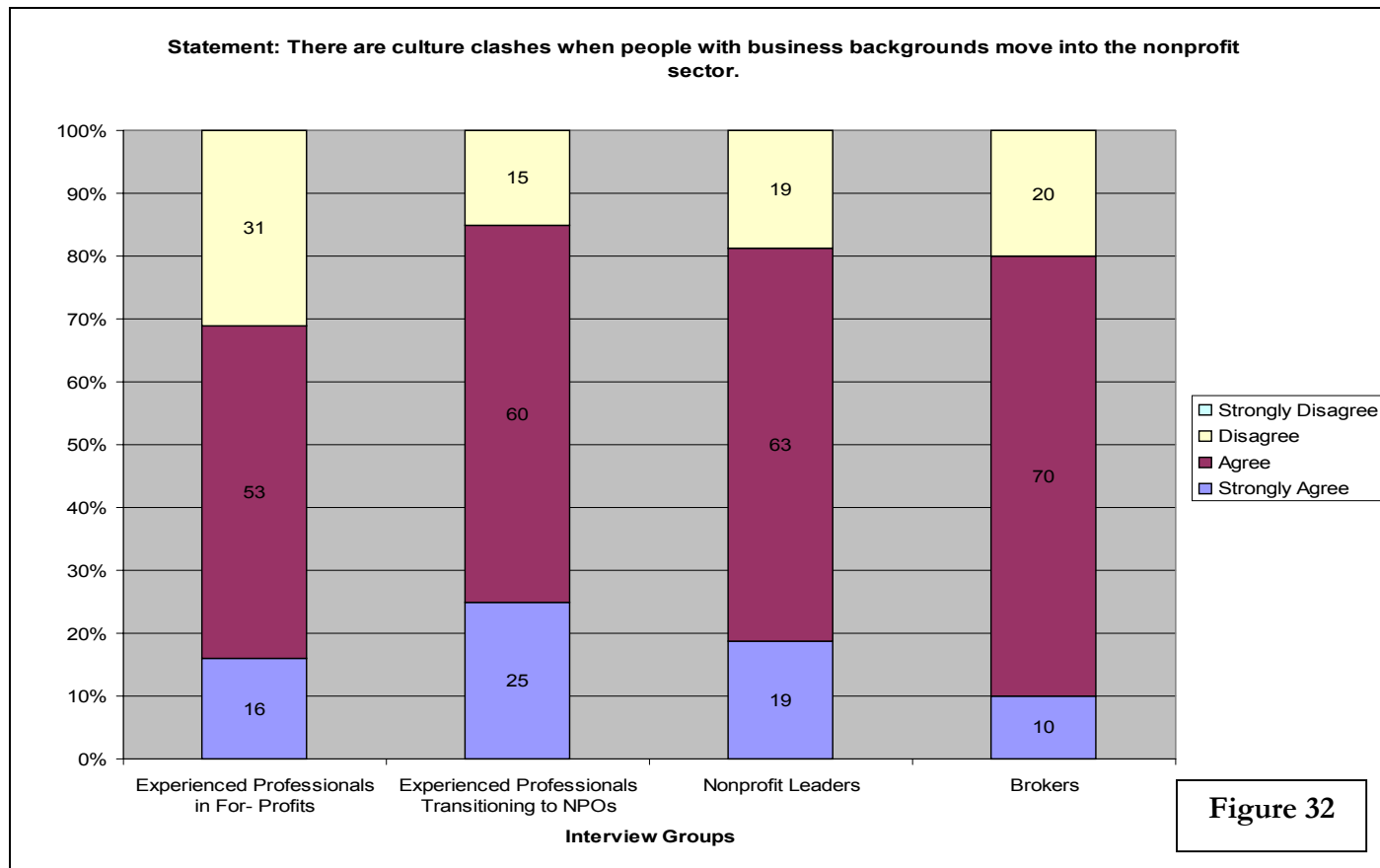
A similar response pattern emerged to the statement: *Nonprofit organizations would be well served by an infusion of business practices and expertise into their organizations.* While all groups agreed or strongly agreed at a rate of 87 percent or more, the strongly agree response from the experienced professionals outside the nonprofit sector was twice that of the other groups. Taken in combination with the responses to the earlier statement, it may suggest that experienced professionals from outside the nonprofit sector tend to be overly-confident about the value of their expertise and underestimate the demands of nonprofit sector work. It is also noted that in other parts of the interview, nonprofit leaders and brokers expressed their concerns about the potential side effects of the for-profit “bravado” in the nonprofit sector (Figure 30).



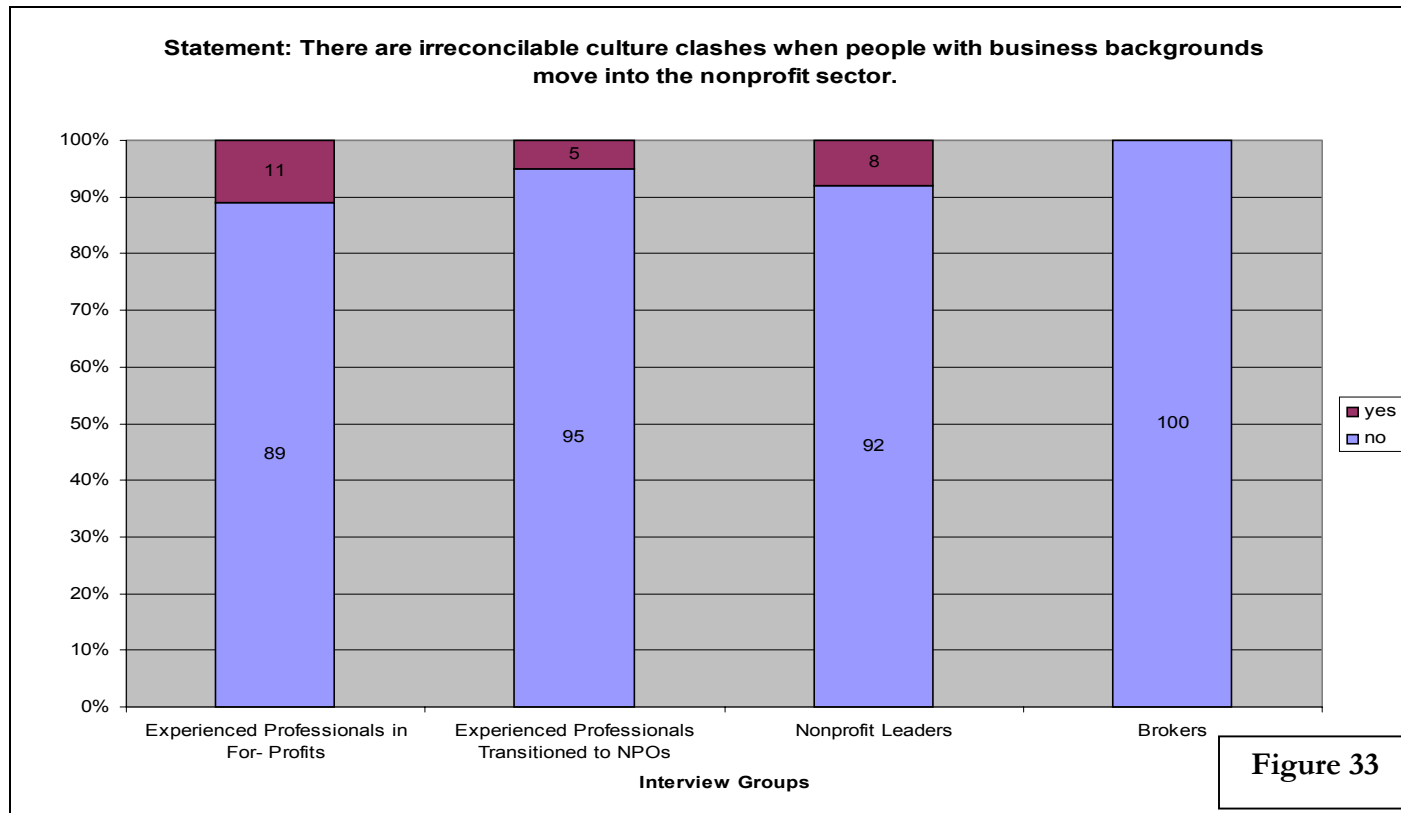
To the statement: *Nonprofit organizations need help in expanding their utilization of experienced workers from other fields in serving their missions*, 90 per cent or more of all groups agreed or strongly agreed.. Nonprofit leaders strongly agreed at a rate one-half as much as the experienced professionals already transitioned to the nonprofit sector and the brokers, and one-third as much as the experienced professionals from outside the nonprofit sector (Figure 31).



A significant majority in all four groups agreed or strongly agreed with the statement: *There are culture clashes when people with business backgrounds move into the nonprofit sector.* The “disagree” response rate (31 percent) from the experienced professionals from outside the nonprofit sector was one-and- one-half to two times greater than that response from the other groups (Figure 32).



Finally, strong consensus was found in the responses to the statement: *There are irreconcilable culture clashes when people with business backgrounds move into the nonprofit sector* with few, if any, believing that any differences were irreconcilable (Figure 33).



## Conclusions

The following conclusions are based on the findings of the Career Transition Project study:

- There exists a unique opportunity to utilize the talents, experience and motivation of older adults at midcourse in meaningful work in the nonprofit sector. Overwhelmingly, baby-boomers and nonprofit leaders see this potential.
- While it is *mission* or the search for meaning and purpose that drives boomers to nonprofit organizations, questions about *sustained commitment* to the mission seem to trouble nonprofit leaders the most about boomers interested in transitioning to the sector. With each group seeking an alignment of values and action, there seems to be fertile ground to explore the mutual benefits that greater linkages between these two groups could bring.
- While compensation and other financial benefits are not among the top drivers cited by pre-retirees regarding work in retirement, people in this study mirrored national survey statistics that for economic and cultural reasons, many boomers anticipate continuing to work for some level of pay.<sup>xxxix</sup>
- Nonprofit organizational leaders, while acknowledging this opportunity, are not prepared to capitalize on it, and need help both conceptually and operationally. Many nonprofit leaders in this study offered that if a credible organization or entity led this effort, they would pay for a “pooled” resource that would help them address critical workforce needs.
- Training, orientation, and introductory internships might help create the necessary bridges between the sectors. Both sides carry some perceptions of what the other sector is about, not always favorable and sometimes a barrier to purposeful and productive relationships.
- There is a paucity of local resources designed to assist individuals in midcourse transition to examine their assets, interests, and goals, and to explore the opportunities for contribution in the nonprofit sector specifically. While a number of organizations exists to provide some of these functions (outplacement services, volunteer placement, job banks), none provide the kind of hands-on “bridge-work” required to prepare highly experienced older adults and nonprofit organization for mutual, purposeful relationships. Current volunteer matching programs are seriously undercapitalized and often limited in scope to address this opportunity adequately.
- The establishment of a local resource that targets aging baby-boomers in transition has an expanding potential of addressing critical community issues. It can also help people who are approaching the traditional retirement years with different needs and expectations but without a template to navigate this new life stage. New partnerships between the for-profit, nonprofit and public sector are possible.

## Local Recommendations and Strategies

**“This new vision of work in later life is a hybrid living somewhere between the demands of a full-time midlife career and the avocation of volunteerism. It is an impulse that affords opportunities not only for enhancing later life and individual fulfillment, but also for helping to stem the devastating human resource shortages that have opened up across much of the social services and education sectors.”<sup>x1</sup>**

**Marc Freedman, Founder and President, Civic Ventures**

The findings of this study affirm what many demographers, social scientists, and futurists have concluded: embedded in the social, cultural, and economic complexities of an aging population lay opportunities for productive intergenerational and community connections. Driven by the intention to work, albeit with more flexibility and choice; the desire to give back; and the need for purposeful relationships; baby-boomers represent an untapped resource for Hartford and cities across America. Moreover, despite the current economic recession that has temporarily relieved the workforce crisis, long term projections forecast significant workforce shortages in areas critical to the strength and vitality of American communities: health care, education, and human services.

The potential to positively impact this challenge by engaging the talents and experience of baby-boomers requires intentional and targeted actions by both parties: the experienced adults seeking meaningful work, and the nonprofit organizations seeking commitment, talent and skills to fulfill their missions.

It also requires new and unique, and often experimental, approaches to develop the kinds of “hybrid” work experiences described by Marc Freedman. New work arrangements must be created to add a decidedly different option to the traditional forms of employment and volunteerism currently available. They must be designed to fit individual and organizational needs, tested, modified when necessary, and replicated where appropriate to build the level of scale required to maximize the opportunity locally and nationally.

In Hartford, like elsewhere across the U.S., current resources that support and broker older adults in career and life transition to employment or volunteerism touch only a part of the need described in this report, if they do it at all. Understandably, they operate within their missions, mandates, and funding/ revenue streams. Capitalizing on this burgeoning opportunity calls for bold and targeted action.

## **TAKING ACTION: BUILDING BRIDGES THAT CONNECT COMMUNITIES**

Based on the conclusions of this study, we recommend the establishment of a new resource in Greater Hartford that bridges the gap between older adults in transition and the nonprofit sector, facilitates the exchange of assets that meet individual and community needs, and ultimately, strengthens the capacity of community-based organizations to carry out their missions. This new resource would utilize both cutting edge technologies that offer efficiencies, ease of access, and data management capabilities, and highly personal professional and peer interaction that assures fit and quality outcomes for all concerned. Such a venture would include most if not all of the following components:

### **Resources for individuals in transition**

- Assessment and planning activities that address the range of life dimensions including work, family, health and fitness, learning, financial security, social relationships, spirituality and philosophy, community, and recreation and leisure, and that result in a clear picture of one's assets (values, motivations, skills, interests, and networks), goals, and action steps.
- Coaching and support (peer and professional) throughout the transition process.
- Introduction and orientation to the nonprofit sector including culture and values, organizational structures and functions, and work opportunities through instruction, mentoring, and internships.
- Linkages to education and training opportunities to prepare for entry into nonprofit sector work.
- Linkages to paid and unpaid nonprofit work opportunities.

### **Resources to nonprofit organizations**

- Workforce Redesign- new models of work start with building a workplace that accommodates and encourages flexibility. Driven by the goal of recruiting and retaining a skilled and committed workforce, flexible work arrangements (flex-time, part-time, project/durational, job-sharing, etc.), compensation and benefit packages, reward and recognition programs, and other supports permit older, experienced workers to make productive and meaningful contributions to nonprofit organizations. Specific help with organizational readiness assessments, job skills and competencies analyses, job design, and orientation, training and supervision programs (internships, job rotation, on-the-job mentoring) are an important part of workforce redesign.
- Workforce Recruitment- communication, outreach and recruitment strategies designed to attract experienced adults to nonprofit organizations. Recruitment strategies include:

- Comprehensive advertising/ recruitment/ communications program that reaches target workforce and educates them about flexible and meaningful paid and unpaid work opportunities in the nonprofit sector.
- Linkages with area corporations, employee groups, retirement associations, faith communities, civic clubs, and volunteer organizations to market work opportunities to the target workforce.
- The establishment of a single point of access system providing screening, assessment, and matching experienced adults with nonprofit work opportunities.
- Linkages with local colleges and universities and/or other professional training and development providers to assure appropriate skills training for experienced adults transitioning to nonprofits.
- Organizational consulting and training to facilitate the successful integration of experienced professionals from other sectors into the nonprofit, and to assure fair and flexible policies and practices for the entire workforce.

# Appendices

## **PROJECT DESIGN TEAM MEMBERSHIP**

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Terry Montuori, East Hartford  
Ruth Rabinowitz, Farmington  
Mark Feldman, Canton

### **Nonprofit Interview Team**

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Carrie Stockman, West Hartford  
Janet Castricum, Hartford  
Brenda Roggeveen, West Hartford  
Jack Waggett, West Hartford  
Barri Marks, West Hartford  
Paula Levesque, Southington

### **Broker Interview Team**

\*Stephen Ristau  
Elaine McDonald  
Bob Bernstein

### **\*Team Leaders**

## **ABOUT THE PROJECT LEADER AND AUTHOR OF THE REPORT**

Stephen Ristau has over 25 years in the human service sector as an executive, senior manager, consultant and trainer, and clinician. He has worked in nonprofit, governmental and for-profit corporate environments.

In 2000, he formed Ristau & Associates, LLC providing project consultation and training services to nonprofit organizations across the United States in areas of board governance, executive coaching, strategic planning, new product development, social marketing and revenue generation, leadership/management skills, and organization development. He is committed to assisting nonprofit organizations achieve their missions with creativity, integrity, and excellence.

Steve is currently involved in a variety of service leadership initiatives locally and nationally through Turning Points Research Institute, Inc. a nonprofit organization that assists middle-aged and older adults find meaning and passion in their life and work. His work with Points of Light Foundation, Libraries for the Future, Civic Ventures, Leadership Greater Hartford and other national and local nonprofits seeks to promote the experience and wisdom of older adults as assets to their communities, and to develop new opportunities for civic engagement and service leadership in their later careers and retirement years. He has served on the advisory board to Leadership Greater Hartford's Third Age Initiative, an innovative community leadership project that promotes the involvement of retired persons in community-building action.

From 1995-2001, he served as President and CEO of the Connecticut Council of Family Service Agencies, a social services provider network and membership association of 28 private, independent, nonprofit family service agencies in Connecticut. At CCFSA, he led the design and implementation of a nationally recognized welfare-to-work program in Connecticut. Steve has extensive experience developing and marketing behavioral health and social services in the public and private sectors.

Prior to 1995, he served for 16 years in executive leadership positions at family service agencies in Massachusetts and Connecticut. He received his M.A. in Human Development and Family Relations from the University of Connecticut, and is a trained marriage and family therapist.

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## **ABOUT LEADERSHIP GREATER HARTFORD**

For over 25 years, Leadership Greater Hartford (LGH) has delivered programs that enable people to make meaningful contributions to the vitality of Hartford and its surrounding communities. From teenagers exploring their Common Ground, to professionals furthering their careers and strengthening their community involvement, to Third Agers sharing their years of experience, LGH programs provide the tools and training that prepare individuals to become better leaders. For more information, visit LGH's website at [www.leadershipgh.org](http://www.leadershipgh.org).

## Endnotes

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