



## BOOMERS LEADING CHANGE

### Work Group Project Plans

At the June 2007 Boomers Leading Change Forum, Rose Community Foundation announced the formation of volunteer work groups charged with creating projects and plans to address the four "next steps" identified in the 2007 Boomers Leading Change Community Assessment:

- Boomer Connecting Points and Networks—physical and virtual places where boomers can get information and resources to help them stay engaged
- Restructuring Institutions and Employment—ways to make employment and volunteer service more appealing, flexible and meaningful to boomers
- A Health Initiative—engaging boomers as health care workers, volunteers, exchanging service for health coverage, or as health policy advocates
- Work Force Development—assistance for boomers in seeking new career paths, becoming entrepreneurs, or retraining to remain productive and earn income

JVA Consulting organized and facilitated the work groups from October 2007 through March 2008. The work groups included a diverse mix of professionals from the nonprofit and public sectors, business people, funders, issue experts and community volunteers. The groups identified dozens of potential projects, finally choosing 12 projects for which subgroups formulated work plans. These are summaries of their project work plans.

# MAKING CONNECTIONS

## Project: *Civic Connections*

### Overview

This project was developed in response to the overwhelming need to connect boomers with opportunities for civic engagement. Efforts to connect boomers in a comprehensive way are spotty at best. As the community assessment indicated, individuals rely on their trusted networks to access information; a single source, be it physical or virtual, would simply not work. The group's vision was to create a "network of networks," a map—that inspires involvement; connects the "disconnected"; has multiple entry points; is inclusive; is both virtual and physical; and utilizes, collaborates with and builds upon existing networks. No easy task, but the group persevered with dogged commitment. Civic Connections is designed not only to increase and improve connections for civic engagement, but also to help boomers assess their own desires for giving back.

### Key Activities

#### Phase I: Exploration and Mapping Existing Resources

Phase I is an exploratory phase to identify existing resources and resource gaps in the community.

Activities include:

- Formalizing Civic Canopy's (the nonprofit leading this project) stewardship
- Researching stakeholders
- Identifying/Convening the initial project partners
- Beginning an ongoing network analysis—map networks
- Developing operating principles

### Description (purpose and goals)

Civic Connections is a dynamic new civic infrastructure designed to increase the connections within, and the active engagement of, communities and individuals in the Denver metro area. Civic Connections links people to civic engagement (work/service/learning) opportunities and resources by bringing existing social networks, organizations, resources and individuals together into a decentralized, intelligent and fully inclusive "network of networks." Part web resource, part community center and part social movement, Civic Connections goal is to increase and improve connectivity, thereby linking individuals' interests with opportunities, assets with needs, and reinvesting social capital back into the Denver community.



## Phase II: Infrastructure and Content

The majority of Civic Connections' "product" is developed during this phase. Activities during this phase include:

- Building network infrastructure
- Creating interagency agreements
- Launching the "Intelligent Directory"
- Beginning to establish member profiles
- Facilitating content development to fill the gaps
- Developing a personal assessment center

## Phase III: Access and Inclusion

Phase III will blend physical and virtual entry points. For instance, a group of people meeting for coffee might generate an idea for a community project and then announce the idea online through the coffee shop's public access terminal. Activities include:

- Creating/improving virtual entry points
- Creating/improving physical entry points
- Establishing network buddy system

## NOTES

# MAKING CONNECTIONS

## Project: *Make it Magnetic*

### Overview

Branding is a critical component to the success of the entire Boomers Leading Change (BLC) venture. The Connecting Points work group grappled with the option to create a comprehensive business plan to brand the BLC initiative, or to limit its focus to the Civic Connections project. In addition, each BLC project discussed whether policy and marketing activities within their own work group should be separate projects or be part of each existing project. Rather than each work group and each project creating its own separate marketing plan, the groups deferred to the Connecting Points work group. This group created a social marketing and outreach plan to drive people, organizations and the community to Civic Connections, recognizing that Make it Magnetic was integrally linked not only to the Civic Connections project but the other BLC projects as well, most of which will become connected to this network.

### Key Activities

Make it Magnetic has two primary activities: social marketing and community outreach.

### Description (purpose and goals)

Make it Magnetic consists of coordinated efforts directed at making Civic Connections attractive, exciting and accessible through community outreach and a social marketing campaign. Because Civic Connections ties the other BLC projects together, Make it Magnetic is both a Civic Connections and BLC-wide marketing and outreach effort. Civic Connections has the potential to revolutionize civic engagement in the Denver metro area. But before this is possible, people need to be aware of it, know how it works, value it and begin to use it. Make it Magnetic ensures this happens by engaging in a social marketing and a community outreach campaign, the combination of which will drive the growth of Civic Connections.



## Social Marketing Campaign

Make it Magnetic will engage a social marketing firm that will develop and implement a social marketing plan with an appropriate promotional mix that will address:

- Market segmentation, targeting and positioning
- Branding
- Message development and delivery

## Community Outreach

Outreach efforts, utilizing the marketing materials developed by the social marketing campaign above, will reach out to people "where they are." This will vary by population but will include: places of worship, neighborhood associations, social clubs (such as Kiwanis or Rotary), schools, libraries and health clinics.

These outreach efforts will include:

- Community leader recruitment
- Promotoras/train the trainer
- Supported word of mouth
- Promotional events

## NOTES

# RESTRUCTURING INSTITUTIONS

Project: : *New Approaches to Higher Education and Training*

## Overview

While there are many programs designed to provide lifelong learning for adults, when boomers want to return to school for a specific degree or training after years in the workplace, the challenge is often how and where to place them to meet their unique needs. This project addresses the lack of education and training options and programs for boomers who want to enhance or begin a new career. The project will work with higher education institutions to explore opportunities to make their programs more accessible to nontraditional students and those transitioning between careers.

## Description (purpose and goals)

New Approaches to Higher Education and Training will create a center for assessing personal and professional changes with facilities to connect boomers to the educational and training opportunities they need to advance their knowledge, skills and other learning needs and work with higher education institutions to explore opportunities to make their programs more accessible to "nontraditional students" and those transitioning between careers or life stages. The creation of a center will establish easy access for all those who are seeking changes in their pursuits, whether educational, developmental (personal or professional), social or beneficial to the community. The linking of the center's coaching and referral hub to the Civic Connections project will provide a single point of contact (both actual and virtual) to the center's resources. The center staff will counsel and coach those who need such assistance. Program information, procedures for access, program outcomes, pricing and other necessary information will be available in multimedia format.



## Key Activities

- Explore existing programs or systems that do a good job of supporting nontraditional students
- Determine higher education needs of transitioning workers who are boomer-age, and share the information with institutions that could support those needs
- Conduct focus groups and interviews to identify goals and training needs of individuals who are changing employment
- Identify gaps in current program options
- Develop pilot training programs to address gaps
- Explore partnerships with workforce development centers and the community college system to focus on retraining lower-income workers for postretirement-age careers.
- Investigate the retooling of what is out there to meet diverse needs
- Establish pilot of matching needs to resources available and partnering to deliver the resources to boomer clients
- Create a clearinghouse and market/connect through the facilities of the Civic Connections project

## NOTES

# RESTRUCTURING INSTITUTIONS

Project: *Building Nonprofit Capacity to Engage Boomer Volunteers*

## Overview

Boomers are keen to volunteer but want meaning and purpose in what they do. They also want flexibility. No more stapling packets weekly on Tuesday mornings between 9 and 10 a.m. It is imperative that nonprofit organizations create mission-driven volunteer opportunities to match people's talents and interests with an organization's needs. For many nonprofits, this is a huge departure from the way they currently operate their volunteer programs. This project is designed to help nonprofit organizations build their capacity to better use the skills and experiences of boomers and all volunteers. The project will research best practices and models in volunteer management and implement a pilot program using lessons learned from these models.

## Description (purpose and goals)

This project will create a program to help nonprofit organizations (NPOs) expand their capacity to fulfill their missions through the strategic use of boomer volunteers. In so doing, the project recognizes and addresses three realities. First, most NPOs lack the capacity to be as successful as they would like to be. Second, many NPOs have little experience in the strategic use of volunteers. Third, the emerging wave of prospective boomer volunteers seeks engagement that is meaningful and productive.

The project will provide tools, resources and support to NPOs that desire to grow and that are willing to use volunteers to perform some of the core, mission-focused functions essential for such growth. In short, this program focuses on organizations and helping nonprofits restructure themselves to maximize the talents and experience of potential boomer volunteers.

## Key Activities

- Develop a partnership with an existing organization willing to implement this program as part of its mission
- Research best practices used in NPOs that build organizational capacity through boomer volunteer engagement
- Create a project leadership team of boomer volunteers, NPO staff, funder representatives and others to provide advice and guidance in the development of materials, services and processes involved in this project



- Develop a toolkit that NPOs can use to guide their efforts to harness boomer volunteer engagement to build their organizational capacity
- Recruit/train boomer volunteers to work with NPOs as coaches and trainers on boomer volunteer engagement
- Develop/offer training and consulting services to Denver area NPOs
- Develop a Web presence to inform, motivate and support NPOs
- Develop/activate an outreach plan to increase NPOs' understanding of how the strategic use of boomer volunteers can build organizational capacity
- Provide outreach/education to funders to ensure their support for NPO efforts to build capacity through boomer volunteer engagement
- Conduct a one-year pilot project involving five NPOs to test the materials and services provided by this program
- Based on the pilot year, involve project leadership team in assessing outcomes, recommending changes to the program and creating a plan for growth

## NOTES

# HEALTHCARE PROJECTS

## Project: *Boomer Corps*

### Overview

"Give me 10 people who care about an issue, and we can make things happen." So announced one boomer during a focus group session. Therein spawned the idea of a group of like-minded individuals who care passionately about an issue and who would mobilize to get something done. Housed in the healthcare group, the initial focus of the corps was to educate boomers on healthcare issues—how to navigate healthcare policies, costs, and more. The concept of the Peace Corps resonated with many. The project evolved into forming a grassroots umbrella organization—one that would engage boomers in planning and policy work to address Denver metro's healthcare issues. The organization would help to identify, coordinate, advocate and raise funds for these projects, which would then deploy boomers to tackle some of the problems in our community. Although originating with a focus on healthcare, the Boomer Corps could spread wider such as the Boomer Corps for hunger.

### Description (purpose and goals)

Boomer Corps is a grassroots, action-oriented, facilitative, umbrella organization that engages boomers in planning and policy work to address Denver metro's healthcare issues. Boomer Corps is the entity that could ensure there is follow-through with the other Boomers Leading Change (BLC) healthcare projects. Boomer Corps is responsible for the identification, potential coordination and sustainability of projects addressing healthcare in the Denver metro area. The primary areas of focus in health care are:

- Government-related health issues, which encompass the many regulations that boomers face with their entry into Medicare and possible new "single payer" proposals
- Care delivery system, which deals with all the parental care that boomers are facing in addition to their own health issues
- Uninsured and underinsured individuals
- The healthcare system itself. The system is often confusing with all the many options, plans, models and premiums.
- Volunteerism in healthcare arena, such as volunteer positions in hospitals as well as healthcare advocacy



## Key Activities

- Explore and identify place to “house” Boomer Corps
- Hire staff
- Develop core values and principles of operation
- Develop guidelines for assessing potential projects and collaborations
- Research community programs/projects, potential collaborations and current legislative work that focus on healthcare issues to help identify gaps
- Seek funding to support Boomer Corps infrastructure and operations
- Create marketing plan
- Identify initial projects based on research and following guidelines established for assessing potential projects

## NOTES

# HEALTHCARE PROJECTS

## Project: *Boomers' Case for Healthcare Reform*

### Overview

"Healthcare, healthcare, healthcare," stated one boomer when asked what the key issues are that boomers face. The goals and design of this project were clear from its inception: boomers are in a strong position to advocate for healthcare reform and we need to leverage their interest and numbers, particularly given the Blue Ribbon Commission for Healthcare Reform. All boomers need is help organizing. Employing a community organizing approach to engage boomers to advocate for healthcare reform, the project will strive to increase Denver area boomers' awareness of and advocacy around key healthcare issues by motivating people to action and helping them to acquire skills and tools to make a difference.

### Key Activities

The project will implement two concurrent action plans.

**1. Building the boomer base.** The first action plan will begin immediately, starting with a house-party strategy model to garner boomers' interest and motivation in healthcare reform. Activities include:

- Convening a group of key stakeholders to map the Denver area boomer communities for how to get boomers involved and implementing a house party strategy, which will include: a brief education presentation about why boomers should care about healthcare reform; an opportunity to share personal stories; and information on action items to take.

### Description (purpose and goals)

The Boomers' Case for Healthcare Reform will strive to increase Denver area boomers' awareness of and advocacy around key healthcare issues by motivating people to action and helping them acquire the tools (knowledge and skills) necessary to address healthcare reform. The project will serve as the "bridge" for connecting healthcare reform expertise and advocacy groups to boomers, and boomers to other boomers, to build and expand an advocacy effort to help transform Colorado's healthcare policies.



**2. Creating an organizational structure** to link healthcare expertise with boomers and create an organized call to action. Activities include:

- Creating a steering committee or advisory group of 15 to 20 individuals representing diverse populations and key leaders in the health area in the Denver metro area
- Identifying values of the project, membership and the model as a coalition
- Establishing criteria for taking positions on issues
- Establishing benchmarks for success
- Hiring staff, including a community organizer to coordinate activities
- Researching current curricula on healthcare policy/issues, and adopt/adapt or develop curricula on healthcare issues
- Conducting focus groups to identify different kinds of engagement
- Developing different levels of engagement

## NOTES

# HEALTHCARE PROJECTS

## Project: *Nurse Retention Model*

### Overview

Nursing is fundamental to high-quality healthcare and patient safety. Colorado, like the rest of the nation, is experiencing an increasing nursing shortage. Several projects were developed through the single passion of one or two individuals. The Nurse Retention Model was one of these. A nurse, who is a boomer, professor and the creator of this project, experienced firsthand the impact the nursing shortage in our state has on patient care and hospital staff. *"If only we could create the option for nurses in their 50s to work a shorter shift—rather than the 12-hour shift—then many of the boomer nurses wouldn't leave. And we need their skills and expertise."* The physical strain of long shift work forces many older nurses to leave when, in fact, they would like to continue working. The Nurse Retention Model addresses both healthcare and the need for innovative, flexible work models to retain older workers.

### Key Activities

The project will consist of the following activities:

- Conduct research on existing hospitals offering flexible scheduling options
- Compile/gather data on the cost-effectiveness of two 12-hour shifts vs. three eight-hour shifts, or other shift hours

### Description (purpose and goals)

In March 2007, Governor Ritter signed an Executive Order creating a Governor's Task Force on Nurse Workforce and Patient Safety. One of three recommendations calls for the development of models for retaining experienced nurses in the workforce. The Nurse Retention Model will create a pilot program that addresses this key recommendation of retention. The pilot project will provide and evaluate a change in shift work scheduled for boomer-age hospital nurses. The pilot will offer nurses age 50-plus variable scheduling options, such as five- or eight-hour shifts instead of 12-hour shifts, with the goal of retaining older and more experienced nurses in the workplace, decreasing nurse turnover rates in the hospital and increasing patient satisfaction.



- Establish pilot program(s) utilizing flexible scheduling principles
- Locate hospital unit in the Denver metro area that would be willing to take part in a pilot program
- Evaluate effectiveness by measuring:
  - Nurse satisfaction
  - Patient outcomes/satisfaction
  - Cost-effectiveness per unit per day, taking into account orientation costs

## NOTES

# HEALTHCARE PROJECTS

Project: *Education and Action for Coloradans Reframing Healthcare (EACH)*

## Overview

With increasing longevity, one of the biggest threats to health and wellness is chronic disease. Heart disease, arthritis, diabetes, cancer, lung disease and other chronic conditions affect nearly half of all Americans. Financial costs created by chronic disease are a burden on individuals, insurers, employers and the healthcare system. Average healthcare costs for people with at least one chronic disease are over two and a half times greater than for people with no chronic conditions.

This project addresses a combination of health and workforce issues facing boomers. Again, spearheaded by individuals representing the government public health sector and health promotion, this project evolved out of the vision to incorporate a best-practice chronic disease prevention program to boomers working in the government sector. Why is this important? As one of the largest employers, government can lead the way to create a work environment that values boomer-age employees, as well as address chronic disease, one of the biggest threats to health and wellness.

## Description (purpose and goals)

Through a pilot program, EACH will implement an evidence-based, self-management chronic disease program to boomer workers with chronic disease in a government setting to capture changes in healthcare utilization. This effort directly aligns with recommendations by the Colorado Department of Public Health and Environment for continued investment in chronic disease prevention, as outlined in *Moving Mountains: Reversing the Trends in Colorado's Health and Health Care Spending through Investments in Chronic Disease Prevention*. The primary goal is to reduce chronic disease among government workers.



## Key Activities

- Engage top government leadership about the program
- Host a summit for government leadership
  - Compile information and educate on why employers should care about risk management and potential cost savings
  - Showcase models that demonstrate best practices
  - Garner buy-in from governmental employees, wellness committees and department heads
- Identify a pool of boomers per government department to develop the pilot with self-management
- Implement pilot program using the Healthier Living model from Stanford University. Train the trainers, pre-test the participants, implement program, conduct fidelity measures, evaluate the workshops and post-test participants after six months.
- Establish a learning community among pilot projects
- Embed self-management programs as part of doing business in government institutions
- Create a boilerplate template regarding policy around employee wellness to be inserted into all state RFPs

## NOTES

# HEALTHCARE PROJECTS

Project: *Informed Choices: A Social Marketing Campaign Around End-of-Life Issues*

## Overview

When the healthcare group first met to brainstorm project ideas about health issues around which boomers could take a lead, one of the participants shared a compelling story. His 92-year-old mother-in-law had recently been taken to the hospital for some condition, but for no apparent reason, she was given a mammogram and a cholesterol test. It caused her huge discomfort and he wondered why these tests were necessary. This story invoked a discussion around the onslaught of medical treatment and interventions often offered to aging parents when they are very ill or dying and wishing they (as boomer children) had had more information and honest conversations with their parents before faced with these tough decisions. The group agreed that these issues needed open discussion, but the challenge was how best to get there. Informed Choices incorporates education, advocacy and coalition building around increasing awareness of end-of-life issues.

## Description (purpose and goals)

Western culture's overwhelming fear of, or discomfort with, death has often precluded any conversations about healthy dying or decisions about advance care planning when it comes to a loved one's eventual death. With the advent of palliative and hospice care models and advance directives, much information about end-of-life care is available to the general public. However, most boomers aren't prepared to share their own desires about care for themselves at the end of life or to act with confidence about the kind of care their loved ones would choose for themselves, if unable to do so. Through education, advocacy and building coalitions, the project seeks to educate and inform boomers about end-of-life issues, including the wide range of options about spiritual and emotional and medical needs and services to support the dying, and the tools that are available to help people make proactive decisions and honor their individual wishes.

## Key Activities

- Compile existing resources and educational programs designed to increase awareness around end-of-life options and holistic end-of-life/continuum-of-care options
- Collect boomers' stories around dying, including stories that demonstrate the importance of planning/ documenting individual choices and options for end-of-life care



- Adapt/develop educational materials on informed dying, the broad range of holistic models (addressing physical, spiritual and emotional elements), and personal choice for end-of-life transitions
- Present information to boomers
- Educate key decision-makers
- Identify legal barriers that can result in a conflict of interests between EMS care and an individual's advance directive instructions. Advocate for policy changes to resolve conflict.
- Advocate for new messaging so individuals have information to make informed choices about end-of-life care
- Work with Denver groups that are working on similar issues

## NOTES

# WORKFORCE DEVELOPMENT

## Project: *Alternative Work Models (AWM)*

### Overview

A 50+ job fair reinforced the image of older working adults, whose only employment options were stocking shelves at big box stores. As one frustrated boomer leaving the job fair said, *"All of these jobs are for \$10–\$12 an hour. How can I support my family on that?"* Still other boomers, who have worked in physical labor, are now seeking jobs that require less strain on their bodies, but they feel unprepared for the job market. The Workforce group immediately recognized the need to create a project that addressed one of the key barriers to employment for older workers: being past retirement age and wishing or needing to remain employed, but lacking flexible options to remain employed at their current job or equivalent. Many companies recognize the benefit of retaining older, experienced employees and are creating opportunities to keep older workers beyond traditional retirement age. But the paradigm shift is slow. The group prioritized the need to create a project to address this issue. The result is a comprehensive plan to research and highlight best practices for innovative models for alternative employment models, develop the business case for alternative work models, create a website database and tools highlighting AWMs, and design and implement pilot programs in workplaces using AWMs.

### Description (purpose and goals)

In the U.S., it is anticipated that 76 million baby boomers will be retirement-eligible in the next 10 years. However, many baby boomers may not fully retire either due to financial or emotional reasons and plan to continue employment past traditional retirement age, in nontraditional arrangements. Due to a shrinking labor pool, many organizations will seek to recruit and retain an older workforce. The purpose of this project is to identify and analyze best practices of organizations/employers that have implemented, or are seeking to implement, alternative work models to recruit and retain experienced candidates. The outcomes are a database and set of tools highlighting these best practices to offer employers.



## Key Activities

- Create business case for employers
- Develop Website and data bases to support AWMs
- Conduct pilot projects to test feasibility and scalability of AWMs
- Develop a marketing plan
- Develop a comprehensive policy campaign to redefine work in ways that are favorable to AWMs

## NOTES

# WORKFORCE DEVELOPMENT

## Project: *Toolkit for Flexible Employment*

### Overview

The Boomers Leading Change Workforce group recognized that employers needed help in assessing their readiness and creating flexible and cost-effective work environments for employees. Although there is some overlap with the Alternative Works Model (AWM) project, this plan dovetailed with a current effort of the Colorado Department of Human Services Division of Aging and Adult Services to create a toolkit to aid employers in addressing flexible employment. The toolkit will provide forms, policies and a guide for human resource managers on how to retain benefits and how to set up flexible jobs beyond job sharing.

### Description (purpose and goals)

The Toolkit for Flexible Employment is a set of tools designed to make the business case for flexible work and aid employers in creating a more flexible and cost-effective work environment for employees of all generations.

### Key Activities

- Collect/compile information on successful employment models that provide flexible work and are cost-effective
- Convene a forum of human resources managers to learn about more current flexible workplace options and learn about existing assessment tools
- Identify/develop a toolkit that addresses the benefits of, and ways employers can develop, the following:
  - Flex time
  - "Profiler" tools, which help:
    - Develop a menu of skill sets for individuals
    - Divide positions into the tasks they comprise
    - Match tasks to skill sets to establish new positions



- Benefits
  - Medical coverage
  - Paid time off
- Sabbaticals
- Telecommuting
- Job sharing
- Workers' compensation
- Unemployment insurance
- Time to volunteer
- Promote the toolkit (through Civic Connections)
- Distribute the toolkit

## NOTES

# WORKFORCE DEVELOPMENT

## Project: *Colorado's Best*

### Overview

Colorado's Best was created to help promote employers who are implementing innovative policies and programs around employee transition via an annual rating system. The project, in part, will help promote and market the alternative work models of employment in the Denver area. The project was an obvious step to support employers who embrace career transition. Reports such as the "Best Of" in Denver's 5280 magazine have been widely used by consumers when selecting everything from ice cream to doctors. Colorado's Best reporting will provide a much-needed assessment of Colorado-based employers and an incentive for creative outcomes in individualized transitions for Colorado employees.

### Description (purpose and goals)

Colorado's Best will manage an annual rating of Colorado-based employers on their policies/programs around employee transition and will compile a report highlighting those employers whose policies/programs are most friendly to individualized intergenerational transition. This report will provide incentives for Colorado-based businesses to provide creative ways to transition employees and utilize employee services in unique ways as a resource that will positively impact the employer bottom line and the well-being of employees. The purpose of this survey and award is to generate interest in developing innovative transition plans within companies and the community. Companies will seek this award as a way to show the community their involvement, commitment and creativity.

The annual awards are planned to be a unique representation that can be placed in the lobby of the company and is a recognizable branding that labels the company as innovative, caring and committed.

### Key Activities

- Partner with identified market research firm to do assessment on what is being done locally and nationally to identify and rate employers on their policies/programs around employee transition and individualized intergenerational transitions
- Partner with market research firm to develop (or enhance current) rating systems for employers on policies, programs and company cultures, including specific criteria such as flexible schedule options, benefits package and consultant options that meet the needs of intergenerational groups



- Partner with market research firm to develop (or enhance current) rating analysis process
- Develop annual report to highlight the best companies in Colorado
- Partner with a market research firm to determine the range and rating of Colorado-based employers (i.e., small, medium and large by revenue/employees)
- Determine where to house the data to ensure credibility and determine the costs associated with housing material
- Distribute results through Civic Connections or other resources
- Create an annual award ceremony to honor Colorado's best employers

## NOTES