



UMassAmherst Outreach **UMass
Extension**



Massachusetts 4-H



**UMass Extension / Massachusetts 4-H
Report on Extension's
Boomer+ Survey of UMass Alumni and
Retired Professional Staff Volunteer Interests
A Collaborative Model:
UMass Campus Alumni & Retired Professional Staff Associations with
Extension & the Massachusetts 4-H Foundation for
Baby Boomer-Plus Volunteer Recruitment**

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**Report on
Extension Volunteer Survey of UMass Alumni and Retired Professional Staff”**

**As part of the project
“A Collaborative Model: The UMass Campus Retiree and Alumni Associations and
Massachusetts 4-H Partnership for Baby Boomer + Volunteer Recruitment”**

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I. Introduction:

There is a growing interest nationally among non-profits regarding how to recruit the highly skilled baby boomer + age group as volunteers. As this large population moves from full-time work into various forms of retirement, much research has been conducted to assess and forecast their potential to meet future labor needs. This report, based on a survey of UMass Amherst affiliated retirees and alumni, adds to current research by providing information on the respondents’ likes and dislikes in regard to volunteering and, based on the findings, suggests how organizations might adjust their internal and external efforts to attract and retain this population as volunteers. In addition to the survey findings, a “one-stop shopping” access model for groups interested in recruiting and retaining campus affiliated boomer-plus age group volunteers is suggested. This model identifies a viable set of processes and organizational channels within the University that could be used to create greater access to volunteer opportunities across the state and which potentially could be used by University programs, alumni, retiree and staff, and outside non-profits.

Academic retirees and alumni comprise a significant part of Massachusetts’ past and current educational workforce given the state’s many outstanding colleges and universities. This “boomer” cohort (ages 50 – 62) also represents a sizeable recruitment pool for organizations seeking volunteers and part-time workers in the state. UMass Extension and Massachusetts 4-H Program staff, funded by the Massachusetts Service Alliance, formed an innovative collaboration with the Massachusetts 4-H Foundation, the UMass Amherst Alumni Association and the Retired Professional Staff Association to design and conduct the “Volunteer Survey of UMass Alumni and Retired Professional Staff” during the first half of 2007. As a group, the survey respondent group is comprised predominantly of well educated, affluent individuals, ages 50-69, who may currently be, or are planning to become, full or partial retirees in the not too distant future.

Living up to their generation’s iconoclastic reputation, baby boomers may well be part of the largest potential volunteer force in the nation, but that doesn’t mean they’re necessarily interested in traditional volunteer roles like stuffing envelopes or passing out fliers. Instead, the survey findings which follow indicate that university affiliated retirees and alumni are looking for volunteer opportunities that speak to their sense of altruistic purpose, involve work with young people and participation as part of a well organized team, and flexible, short-term service opportunities. The data which follows is intended to serve as a reference not only for this project’s collaborators, but also for other organizations and colleges who wish to reach baby-boomer + campus populations in order to fill volunteer positions.

II. Background:

The “Baby Boomer-Plus Volunteer Initiative” grant award from the Massachusetts Service Alliance (MSA) funded UMass Extension, Massachusetts 4-H and the Massachusetts 4-H Foundation to survey of interests and needs of boomer + affiliated campus retirees and alumni. It was also awarded to contribute to a redesign of the Massachusetts 4-H Program’s volunteer recruitment. MSA was strategically selected by Governor Deval Patrick to administer the Commonwealth Corps and to serve as the clearinghouse for service-related activities across the state. Funds were earmarked for and awarded to eight separate organizations across the state for initiatives that would provide information about and enhance recruitment and retention of the baby boomer + age group volunteers in Massachusetts. As such it provided incentives for focus on much needed improvements in volunteer recruitment that would have been cost prohibitive for these groups.

This survey project employed an innovative University collaboration among Extension administration, its Massachusetts 4-H Program and review team comprised of 4-H volunteers and staff, the Massachusetts 4-H Foundation, UMass Amherst Alumni Association and the Retired Professional Staff Association. The Massachusetts 4-H Foundation and UMass Extension administered and provided matching funds for the project. The campus association partners, involved in survey planning from the beginning, provided access to mailing lists and resources to support the needs assessment of the volunteer interests of UMass Amherst affiliated boomer + age retirees and alumni who live across the state. *(See Appendix A: Project Organizational Partners)*

The majority of the respondent group fall within the demographic lines of baby boomers: 50% of the survey’s respondents were from the 50- 59 year old age group, with part of the 29.6% from the 60 – 69 year old age group also qualifying as baby boomers (born after 1945). Over 4013 members of the Alumni Association and Retired Professional Staff Association received survey mailings, with 423 completing the survey, a 10% sample of respondents. The Extension Project team, comprised of staff, faculty, graduate and student interns, reviewed current national research, designed and implemented the needs assessment survey, and analyzed the statistical data. The 4-H volunteer and staff review group and alumni offered recommendations as to the survey questions to be asked and new marketing materials. *(See Appendix C: Volunteer Survey of UMass Alumni and Retired Professional Staff)*

Results from the survey will be used to help shape Massachusetts 4-H’s targeted volunteer recruitment and marketing efforts as well as those of the UMass Alumni Association and the Retired Professional Staff Association. Survey findings and organizational outcomes will be shared with Massachusetts legislators and publicized through the Massachusetts Service Alliance, Extension, and Alumni Association web sites, and through annual reports, state-wide newspaper and journal articles and within the national USDA/Cooperative Extension System. These efforts are also intended to inform other campus-based groups’ and non-profit organizations’ approaches to creating appropriate marketing materials for the recruitment of campus retirees and alumni as volunteers. *(For more detailed information on intended outcomes of the project, see Appendix B: Project Goals)*

The respondents to the survey are largely a highly educated, predominantly white, married, and generally prosperous boomer professional group. Additional research on the volunteer interests of other non-association staff and union affiliated membership would no doubt yield a more diverse and comprehensive picture of campus populations and their preferences.

The information gleaned from the survey can nonetheless help shape campus affiliated baby boomer + volunteer recruitment, retention, and marketing efforts and contribute to the creation of more flexible organizational structures and processes to achieve these ends.

III. Survey and Reporting Methodology:

A. Survey Implementation:

The project team conducted a series of pre-assessment interviews with boomer + alumni to derive categories of questions and topics to be included in the needs assessment survey. They examined articles and national studies on baby boomer + volunteer interests, volunteer management trends and organizational development changes to inform the survey design for the campus affiliated baby boomer + cohort. The survey questions included queries in the following categories: *Previous Affiliation and Volunteering History; Motivating Factors; Time and Frequency of Volunteering; Roles and Tasks; Incentives; Preferences on How One is Contacted; Sources of Volunteer Opportunities; Skills; Preferred Events and Programs; Extension and 4-H Program Role Interests.*

The survey established demographic categories including: age groupings, gender, employment status, marital status, education, income levels, race and ethnicity. The database tabulated statistical results documented written qualitative comments, generated statistical tables, and identified means and significant variables so that findings could be compared across demographic lines for each item.

The survey requested respondents to rate their high, moderate, or low interest. All group respondent data was analyzed by these percentages and by areas of significance when considering higher mean values (*See Appendix C: "Volunteer Survey, Percentages and Mean Data"*) Some survey questions and all demographic breakdowns of responses (*See Appendix D: Demographic Data Tables*) were also analyzed by examining combined high and moderate interest levels as a joint percentage for some questions. The latter analysis helps identify features that might be used for publicity or recruitment appeals to volunteers, as these persuasion oriented communications seek to attract individuals who may have either a high or moderate interest in a particular topic.

B. Survey Distribution:

Out of a boomer sample of over 23,000 Alumni Association members, 3,763 names were selected using every seventh name. Of a total of 500 Retired Professional Staff Association names, 250 were selected taking every second name. Surveys were formatted, printed and mailed. The sample received mailed survey instruments, with a 10% return rate. Returns were tracked, with a second postcard reminder designed and printed following two weeks after the survey return date.

C. Delimitations of the Survey:

Surveys were sent to the sample population via postal mail instead of using e-mail addresses, given the high change factor in electronic addresses and the concern that home e-mails would not be checked as regularly as those at the workplace. After results came in indicating that the 50 – 59 boomer age cohort preferred contact via e-mail, in retrospect an e-mail survey instrument might have increased returns, provided a relatively stable address sample was available.

The sampling procedure used to identify survey mailing recipients was based on age range and did not guarantee a defined racial or ethnicity sample percentage proportionate to existing

Massachusetts demographics. Therefore the results of the survey are based solely on who chose to respond and their own designation of their race. Similarly, the sample was largely comprised of middle to upper middle class professional alumni or retired respondents, and income ranges of the members of the respective associations were not analyzed to define the mailing population.

D. Demographics:

Respondent data was organized and analyzed across the following demographic areas: by age, educational level, employment status, gender, income, and marital status.

RACE & ETHNICITY: Survey respondents indicated they were 96.9% white. (Data from the Civilian Labor Workforce (CLF) profile for the state of Massachusetts indicates that Massachusetts’ CLF is 84.7% White, 5.1% Hispanic, 4.3% Black, .2% percent American Indian/Alaska Native, and 3.6% Asian.) Alumni Association and Retired Professional Association member’s confidential mailing lists did not indicate the race, gender or ethnicity of the 23,500 members from whom the sample was drawn.

- **AGE:** 50.1% percent of respondents were ages 50 –59 (early boomer); 26.9% were age 60-69 (late boomer).
- **EDUCATION:** 59.2% had postgraduate degrees; 35.2% bachelors degrees.
- **EMPLOYMENT:** 44.6% were employed or self-employed full time, with 28.5% retired and not working, some indicating that this was due to disability or caregiver responsibilities for family members.
- **GENDER:** 52.2% of females and 47.8% of males responded to the survey.
- **INCOME:** 60.5% had incomes within the range of \$61-100,000+. 34% had incomes within the \$21-60,000 range. 5.4% had incomes of \$20,000 or under.
- **MARITAL STATUS:** 72.3% respondents were married.

(For breakdowns of responses as sorted by demographic groups, see: Appendix D: “Demographic Data.”)

IV. Survey Results: Patterns, Trends and Differences among Groups:

(For survey questions and the range of response percentages for each item, see: Appendix C: “Volunteer Survey of UMass Alumni and Retired Professional Staff.”)

A. Estimated Volunteer Activity of Survey Participants:

The survey asked respondents to estimate their own recent and future volunteer activity at the beginning of the survey: *“In the last 12 months, have you volunteered for the following?”*

UMass Activity	Yes: 8.3%	No: 91.7%
Community Activity	Yes: 48.3%	No: 51.7%

Although the bold percentages above indicate volunteer respondents who did not volunteer, the sample population proved interested enough in the topic of volunteering, or in the UMass programs who asked them to complete the survey, to submit their opinions. As respondents did not indicate on this item whether they had received requests to volunteer from either UMass or community groups, some respondents indeed may have been interested in volunteering if they had been contacted, as the results to the subsequent survey item suggest.

“In the next year, do you plan to volunteer for the following?”

UMass Activity	Yes: 7.2%	No: 49.7%	Don’t Know: 43.1%
Community Activity	Yes: 42.6%	No: 22.1%	Don’t Know: 35.4%

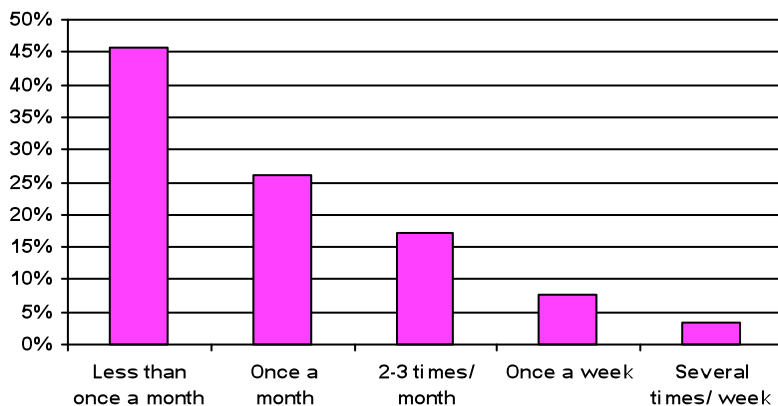
When queried as to their potential plans regarding future volunteering behavior with the question above, survey respondents indicated that they did not know whether they would volunteer for **UMass (43.1%)** or **Community Activities (35.4%)**. This suggests a potential untapped segment of individuals who might be persuaded to volunteer given the appropriate contact methods, marketing approaches, incentives, and given volunteer management structures allowed for flexible time commitments and a variety of non-routine work roles, as further data from the survey indicate. As marketing best practices target not only on those expressing the highest interest in any given endeavor or product, but also those who are neutral, undecided or uninformed about it, the above highlighted percentages indicate potential additional volunteers who could be recruited from this respondent campus affiliated boomer + age group.

B. Time and Frequency of Volunteering:

Almost ¾ of respondents desired short-term volunteer service commitments of one time a month or less.

- *“I’d probably be more likely to volunteer for one-time events than for on-going activities, unless they were education related.”*
- *“A long term commitment is difficult to make with my current family situation.”*

The mean value for total hours per month individuals would be interested in volunteering for university sponsored or community programs and events is 6.97 hours per month with other frequency percentages of responses indicated in the chart below.



Qualitative data in hand-written entries, which some respondents entered on the “other” column within each survey question, indicate that survey respondents wanted volunteer organizations to be well organized, use the volunteer’s time effectively, and listen to the volunteer’s opinions and ideas as a respected member of the work team. These comments also indicate that volunteer organizations will have a better chance of recruiting these highly educated individuals if they provide *“...activities that I really enjoy,”* allow volunteers *“...actually to get something done,”* are offered in close *“...proximity to home, fitting my schedule,”* and provide a *“...chance to work along with staff.”*

C. Factors Motivating Individuals to Volunteer:

In a recent federal announcement of funding opportunities, The Corporation for National and Community Service recently summarized the importance of motivational factors to volunteering, and cited as a key aspect the need for organizational effectiveness.

“Today, more than 61 million Americans (or 27 percent) volunteer through nonprofit organizations with another 5 million finding ways to help outside any formal group. Four in five nonprofits use volunteers. However, according to the 2004 Volunteer Management Capacity conducted by the Urban Institute, only 1 in 4 nonprofits effectively manages its volunteer resources.

The report *2007 Volunteering in America: State Trends and Rankings in Civic Life* indicates that approximately 20 million people who volunteered in 2005 did not volunteer in 2006. This represents an estimated loss of an estimated \$50 billion dollars worth of volunteers’ effort in the nonprofit sector (Independent Sector’s values the average volunteer hour at \$18.77). While volunteers stop volunteering for various reasons, one significant factor is volunteer satisfaction. Satisfaction may be defined as the gap between expectations and reality. The expectations of today’s volunteers are changing. In addition to expecting a well-managed volunteer program and effective communications with staff, today’s volunteers – just like paid employees – are more likely to need to clearly see how their contributions result in a positive, measurable difference in someone’s life. They need to see the “mission return” for their volunteer time investment. And if they don’t, they are more likely to leave.”

This survey indicated that UMass alumni and retiree respondents clearly aligned with these research findings when asked to indicate what factors motivated them to volunteer for university or community sponsored events. In addition to the survey results which follow in this segment and are reported below by demographic group, write-in comments also indicate that good organization, positive communications and being part of a team contribute to respondents’ interest in volunteering initially and continuing to do so over time, as are having reasonable expectations for tasks volunteers are to perform.

- *“Able people volunteer primarily to serve where there is a well-defined set of goals, advance agendas for meetings, and a clear opportunity to accomplish something. The situation must also provide an atmosphere where their suggestions and ideas will be well received.”*
- *The “event must be well organized and fully utilize the volunteers and provide good support to the volunteers to make it worth doing.”*

Other write-in comments suggest that some respondents want volunteer opportunities to be efficient, less top-down and more participatory than traditional top-down volunteer management structures. These baby boomer+ volunteers expect the organization to be able to demonstrate that their time had not been wasted. Others indicate a preference for local activities or voiced concern about tasks being assigned to volunteers that should belong within staff responsibilities.

- *“Keep it local and well organized. Make it so volunteers feel they amounted to something.”*
- *“Would prefer (volunteering for) programs in my local area.”*
- *“Actually getting something done, not just talking... motivates me to volunteer.”*
- *“Most volunteer activity should be done by a person who holds a job and is paid to do the activity. Often volunteering is equivalent to putting someone out of a job.”*

It is also of note that proximity to retirement, as well as age, family interests, and health factors played into the willingness of the boomer group to volunteer. In write-in categories some indicated they would be willing to volunteer if they were not already engaged in taking care of ill family members or were not themselves suffering from physical disabilities.

- *“I find volunteering a very fulfilling, satisfying endeavor but I tend to look for volunteer opportunities that are close to home and directly impact my daily life and that of my family’s.”*
- *“I do not volunteer because my situation is fragile.”*
- *“Between my work schedule and helping to care for my frail, elderly mother, I currently don't have much time or inclination for volunteer work. I absolutely do look forward to volunteering when I retire.”*
- *“Currently I am working full-time to help support my two youngest children through college (one has graduated already). Spare time is spent helping elderly parents remain at home, thus time for volunteering has decreased substantially”.*
- *“Presently I am unable to volunteer due to family illness. I would consider offering my time when the situation changes.”*
- *“I am a 100% disabled veteran and walk with crutches, so getting places and doing things is very restricted.”*

When looking at total group survey findings as well as specific demographic patterns, it is a major finding of this survey that, to this respondent group, the highest motivating factors causing one to volunteer are altruistic ones.

- *“If everyone volunteered as little as I do, the world would be a much worse place.”*

This is not surprising when considering that people generally tend to contribute their time without pay for things they value, but it is of interest that the following factors proved of high value across gender, for married individuals, among all employment levels, for the higher income levels (\$81-\$100+) and all ages, but higher percentages of interest were indicated by the boomer 50-59 age group, who are known for their generational activism and interest in improving society and the environment, than for older respondents.

- *“It's time for the next generation to take over; we're still active in town functions, but our political lines are over.”*

Given combined high and moderate interest ratings, the following factors appeared as key motivators stimulating volunteering for a group or organization: “Contributing to society,” (90.6%); “Working for an important cause or purpose.”(90.2%); “Opportunity to share skills and knowledge” (87.3%). Such findings suggest the importance of highlighting how an organization’s activities bring benefit to the larger society when seeking to recruit volunteers and also of including such appeals within marketing materials.

- *“Given the state of the world environment, I feel a need to concentrate on environmental and land conservation exclusively.”*

The following motivators were also highly rated when considering combined high and moderate interest. “Mental stimulation and challenge,” (83.3%) and “Connection to personal skills or interests” (85.7%) were also of higher value to females than males, among the retired/working, across most income levels, but varied across ages and marital status. “Contact with others”(85.8%) was of higher importance to the single female group, the 50-59 age group, significant among the retired/working, and desirable among the \$21-40,000 and \$61-\$80,000 income groups, with most high interest alone (38.3%) expressed by the \$81-100,000 group. “Physical activity” was a somewhat higher motivating factor across gender, for married

individuals, for the 50 to 59 age group, among the retired/working, and provided more combined high and moderate interest (72.3%) to the \$81 -100,000 income versus the lowest income groups, with the highest interest alone expressed by \$41-61,000 group.

Survey results also suggest that many commonly used motivational incentives offered by organizations do not apply to this survey's sample population. "Networking for paid work opportunities" was more of a motivating factor for the retired/working, and employed, with most combined moderate and high interest expressed by the lowest income (\$20,000 or less) and the \$81-100,000 groups, but this opportunity did not serve as a motivator across all ages, gender or marital status demographics. "Compensation" was most desirable for those with incomes of \$40,000 and below and those within the \$81 -100,000 range, but was a low motivator across all ages, gender or marital status. "Recognition" was the lowest motivating factors across gender, all ages, marital status, all employment levels and most income levels, except the \$81 -\$100,000 income group. This finding suggests that some of the traditional incentives such as award dinners, pins, or various gifts are not high motivational methods for this professional, campus affiliated group. Also of significant note is that the "Retired /not working" respondents showed less interest in all motivators, as did the "Less than \$20,000" income group.

D. Volunteer Roles and Tasks:

A major result of the study is that a majority of this sample population wanted to work with young people. Given the "university relatedness" of the survey respondent group, this is perhaps a logical result, but one should nonetheless prove of value to organizations serving youth, such as 4-H. Also of interest is the breakdown of which age groups and types of youth /work settings (at school, out of school or university students) are favored according to a respondent's gender, marital status, income level or employment status. "Working with youth" in both in-school and out-of-school settings was of highest interest to baby boomers, the married females and those retired but still working, as well as for those employed, and across most income levels. "Working with university students" was of more interest to the married males than females and among those with higher incomes.

- *"I love kids & would like to give back. I've had a fortunate life and would like to help young people."*

The least interest in all role areas was expressed by the lowest income group, yet "working with youth in school settings" proved of high interest for this group and was identified as a skill they would be willing to contribute. Working with youth in both in and out of school settings was also of high interest to the \$100,000 or more income group. This finding is of note for organizations seeking volunteers for out-of-school youth programs like 4-H – paradoxically volunteers from both the lowest and highest income groups might prove the most interested in such service opportunities, given a variety of roles and tasks from which to choose.

This predominantly campus affiliated professional respondent group was not interested in contributing "Research/writing" skills and neither were all marital status groups, males and females, and the 50 to 59 age group. Scholarly activities proved more desirable for the middle and higher income groups (\$41-\$100,000). "Providing leadership" was of higher interest among married males, the retired/working, those with higher incomes (\$61,000+), those holding bachelor and post-graduate degrees, and the 50-59, and 70-79 age groups. "Public speaking" was not of interest to "Less than \$20-60,000" income group but was of somewhat more interest to the \$61-\$100,000+ range income groups, the employed and to males. "Advocacy" proved least desirable to the lowest income group (86.7%) but was of more combined high and moderate interest among the \$81-100,000 group (55.3%), and the 50 – 59 boomer cohort (39.9%).

The most favorite role for married individuals, for those ages 50 -69, the employed and retired working, for those with \$81 -\$100,000+ incomes was “Serving on committees.” This suggests that this cohort may indeed be interested in the shorter term recommendation or guidance functions needed by non-profit groups which are commonly located in advisory or board organizational structures. Across all income levels, about half did not want to be involved in “Event Planning” while the remaining showed moderate or high interest in such activity. The least favorite role among married individuals, specifically in the 50-59 age groups, was “Publicity or marketing” and “Providing transportation.” Those with higher incomes indicated more interest in “Publicity and marketing” while those of lower income levels showing somewhat more interest in “Providing transportation.”

Very few groups wanted to contribute financial, legal, risk or building services, either due to lack of having those specific skill sets to offer or due to little interest in continuing this type of work within a service role. Very low interest in “Building or trades” related work was shown among the married, single, widowed, and the divorced, among females and all income levels and all ages. Males and those with bachelor degrees and below showed more interest in building.

The least favorite roles among females across all ages, regardless of marital, employment, or income status were “Financial services” and “Risk or legal services” with males showing only slightly less aversion to these tasks than females. “Leading outdoor activities” was the least favorite among the females, and of some combined moderate and high interest to the 50-59 and 60 – 69 age groups, but proved of significant interest for the retired/working, somewhat less than half of males, and seemed slightly more desirable in combined ratings to the higher income groups (\$61 –100,000+). These findings suggest that organizations in need of specialized skills ought not to assume that the campus boomer cohort is interested in providing these services or that they have such skills to contribute. Recruiting through professional associations, businesses or firms offering the requisite specialized service, hiring consultants, or staff to assume these tasks would be more effective.

Other roles that non-profits often seek avidly among volunteers are not of interest to certain demographic groups. Males, regardless of marital status, and among the 50-59 and 70-79 age group, indicated little interest in “Fundraising” (76.8%), “Publicity” (74%), and “Clerical/administrative” (68.5%). “Clerical/administrative” was also a low interest role for a little over half of women (57.8%) and by those with “Less than \$20,000” incomes (80%). However, (47.6%) of the \$21-40,000 income group proved more interested in such roles. Dislike of “Fundraising” was shared by all marital status groups, and was least attractive to those 70-79 (80.4%), the retired/working (81%), those with post graduate degrees (75.4%), and those with incomes of \$20,000 or less.

- *“When you attempt to strong-arm volunteerism, it will back fire... some people will volunteer, some never will.”*

E. Incentives of Interest to Volunteers:

This survey question sought to measure which types of amenities or no-cost gifts commonly offered to volunteers would increase the likelihood that they would volunteer for university or community programs and events. When looking at the range of “very much,” “somewhat” or “not at all” interested responses, the attractions of a “Pleasant work space,” “Free tickets,” and “Discounted lodging” proved most desirable to the baby boomer populations. “Free parking,” “Discounted meals” and “Reimbursable expenses” emerged as significant incentive factors for those in the lowest income bracket, who were also most interested in all incentives.

- *“The easier it is to do... the more likely people will participate. Parking for many of us is often an issue, as it’s not always so conveniently accessible to the activity.”*

“Pleasant workplace” proved the most valued of all incentives and showed significant combined high and moderate interest by retired/working respondents (83.1%), and to females (80.8%). This amenity was favored by all income levels but more so by those at \$41,000 and below and those at \$81,000-\$100,000.

Females, regardless of marital status, employment status and between the ages of 50-59 and 70-79 valued: “Pleasant work space,” “Free tickets,” “Reimbursable expenses” and “Discounted lodging.” Both sexes, regardless of marital status, desired discounted meals. “Discounted meals” were also a significant preference for those in the \$20,000 income level. “Reimbursable expenses” and “Discounted lodging” were significant preferences for respondents with income at \$20,000 or below and those at \$81,000 - \$100,000.

“Free parking” was of significant high to moderate interest for those who were retired/not working (71.1%), the employed (70.3%), and retired/working respondents (78%), and was preferred by those earning \$20,000 or below, single females, and respondents ages 50 -59 and 70 -79. Free tickets were slightly more desired by the \$60,000 and below income levels.

F. Interest in Volunteering for Specific Events or Organizational Purpose Activities:

Almost half of the respondents indicated a high interest in volunteering for school or educational organizations (42.6%), followed by environmental issues groups (39.6%), senior groups (33.7%), and cultural or arts groups (30%). University student tours, school reunion committees and fund-raising events were of little interest with over 90% of respondents indicating low or no interest in these activities. Interestingly, although some other major studies show faith based organizations drawing a higher number of interested boomer aged volunteers, for this population, there was lower interest expressed (“Are you interested in volunteering for the events or organizations listed below?” Faith based organizations: **13.9%** Yes; **86.1%** No). This could be due to a lack of interest, or be interpreted as indicating that respondents were already involved with certain religious denominations, and had no interest in additional volunteer activities in this area. *(For a listing of favorite and least favorite activities as rated by volunteer survey respondents, see Appendix D: Interest Level in Volunteering for Specific Activities.)*

G. Preferred Method of Volunteer Recruitment Contact:

Respondents preferred to be contacted by a friend when it came to volunteer opportunities; this was truer for females (combined moderate high rating of 81.3%) than for males (73.6%), who also favored personal letters (84.4%) and contact via the web (72.1%). Most demographic groups would prefer to be contacted by personal letter. Retired/not working (42.6%) expressed the least interest in being contacted by e-mail of all employment status groups, but high and moderate combined interest ratings indicate that the 50-59 age group (73.5%), the employed (74%), and the retired/working (74%), did prefer being informed of volunteer opportunities via the Web or email. This method was also significant for the 60-69 year olds, married individuals, and higher income level respondents. Almost all groups rated group luncheons or phone call contact for volunteer opportunities as less attractive. 60.3% of retired/working reported not wanting to be contacted at all via local TV messages, with the employed (53.3%) finding telephone contact the most distasteful.

- *“Please do not call during sporting events or dinnertime.”*

The employed (68.5%) and retired/working (68.8%) groups showed combined high/moderate interest in being contacted by the Alumni Association regarding volunteering opportunities.

Married males, individuals between 50-59 and 70-79, and the retired/working preferred contact by the UMass Amherst Alumni Association or University departments. Contact by the Alumni Association was significantly preferred by the \$100,000+ income group while contact by a University department was significantly preferred by the \$61- \$80,000 income group.

The Retired/working expressed the largest moderate/high combined ratings (45.7%) for being contacted by the Retired Staff Professional Association. Retired/not working, the employed, and retired/working groups all expressed combined high and moderate interest (range 50 – 65%) in being contacted by either a University volunteer office or by volunteer organizations. Single females (combined 61.1%), and those ages 50 to 59 (combined 62.2%), also approved of contact by a University affiliated volunteer office, as did around half of those in all income levels.

Married individuals, across all income levels, those ages 50 -59 and retired/working favored contact by other volunteer organizations. Females across all ages, regardless of marital or employment status, and across all but the lowest of income brackets, preferred to be contacted by friends. The least favorite approach across gender, all ages, income levels, and marital and employment status groupings was through a fraternity or sorority group. Contact by the University Chancellor was the least favorite among single males, ages 50 -59 and 70 -79, and for those working or retired but was significantly preferred by the \$81,000+ income groups. The least favorite approach among males, those with incomes of \$20,000 or less, across all ages and regardless of marital status was through the Retired Professional Staff Association although contact from this association was most frequently preferred by retired/working respondents.

H. Skills Volunteers Are Interested in Contributing:

- *“Many retired folk have very limited time to volunteer for the areas you mention above. But we do have certain skills/ interests which, properly scheduled and used, many be of value to University-focused programs and events and the local community.”*

There are interesting correlations among demographic categories and the skills groups are interested in contributing as volunteers. “Working with youth” was a significant skill and interest area for the 50-59 year olds as compared to the other age groups and was of interest especially among married individuals. It was also of greatest combined high and moderate interest to \$21-40,000 and \$100,000+ income groups. “Teaching” was of significant combined high and moderate interest to the \$21-40,000, \$61-100,000 income groups and of more interest to females as compared to males. The least interest in most all of the skill areas was expressed by the lowest income group. “Sharing skills with others” also proved of higher interest to the less than \$20-40,000 group.

- *“I am a school principal would like to help aspiring teachers and administrators.”*

In regard to Extension and 4-H related activities, the lowest income group expressed the most interest in volunteering for traditional 4-H roles such as “Leading and supporting 4-H groups,” “Recruiting 4-H adults,” and “Recruiting 4-H youth.” There was the highest interest in volunteering for Extension’s Agricultural and Landscape Program, Natural Resources and Environmental Conservation, and Fine Arts/Arts Extension groups expressed by the less than \$20,000 group. The Nutrition Education Program evoked the most volunteering interest from the lower income groups and least from the higher income brackets. Highest expressed interest in contributing skills for Fine Arts and Arts Extension came from the \$61-100,000 income level.

Least favorite skills across gender, ages, and marital status: “Technical/computer skills,” “Fundraising,” “Human resources,” “Marketing.” “Fundraising” and “Risk Management” are a

universally disliked volunteer role by most groups except that the \$21-40,000 and \$100,000 + groups show a slight willingness to contribute such skills to volunteer situations. Females were least interested in “Financial” and “Risk” issues, “Government Relations” and “Non-profit Management,” the latter of which was least desired by the “Less than \$20,000” income level. “Legal” skills were of least interest to retired/not working, employed, or retired/working groups to contribute. It is of note for when considering recruiting volunteers for office related or human resources and management tasks, around 40% of each employment status group respondents indicated some combined moderate or high interest, with the most interest shown by the retired, working (45.1%).

Interest in volunteering many more specialized skill areas such as “Government relations” and “Human resource management” work proved most appealing to the \$81-100,000+ group, who also showed more interest in “Fundraising” and “Non-Profit Management.” The \$81-100,000 group also showed more combined high and moderate interest in “Financial,” “Technical,” “Government Relations,” “Marketing,” “Developing Publications,” and “Teaching” skills compared to other groups. “Government relations” proved a more significant skill and interest area for the males as compared to the females. The lesser skill to contribute among males across all ages and income levels and regardless of marital status was “Legal” skills. The skill that married males, & ages 60 to 79 least preferred to contribute in volunteering was “Developing publications” although this was of more interest among those with incomes of \$81 -\$100,000.

V. Implications for 4-H and Extension:

A. Massachusetts 4-H:

Low interest in 4-H volunteer roles and tasks was indicated by respondents to this survey. There are several possible reasons for such results. One factor may be the design of the survey instrument itself, which listed current 4-H volunteer activities in more specific detail than other Extension programs which were represented only by their program names, which refer to general and well-known needs in society, for example Natural Resources, or Agriculture. Because 4-H wanted information on the degree of interest in specific volunteer roles and activities, this survey approach was used. If the 4-H Program had been listed only by its title, or if it had been listed as 4-H Youth Development Program, thereby indicating a broader social purpose, responses may have been different.

There may be other possible perceptual influences at work as well. Campus affiliated professional retirees or alumni survey respondents might associate “working with children” more in terms of school based activities or other more publicly visible after-school or mentoring organizations than with 4-H. Older respondents might be more likely to associate 4-H with its historical origins and past activities, or link 4-H volunteer service exclusively to animal science, rural communities, or county fair activities. Older volunteers may not be aware of the many changes that have occurred within Extension programs, such as different learning topics 4-H provides to youth, including science, technology, and public speaking. Often people do not know that 4-H is a program linked nationally through the Cooperative Extension system with university faculty who develop curricula based in sound youth development research and best practices. Perhaps the extended time commitment required from volunteers who are asked to run youth clubs each month seems too demanding, or the idea of “leading” small groups of youth on a regular basis sounds too challenging.

- *“I feel 4-H played an important role in my early life but was not aware that the Extension Service was still in business.”*

One finding of interest is that those in the \$20,000 and lower income groups did significantly want to participate in more 4-H events than other income groups -- “Judge 4-H events,” “Share a skill or hobby,” and “Recruit 4-H adult volunteers and youth” “Chaperoning youth,” “Supporting 4-H field offices,” and “Assisting at 4-H events.” This group was, however, not interested in “Promoting 4-H via the media.” The retired/working expressed interest in such activities as “Judging 4-H events,” “Sharing a skill/hobby,” “Assisting at other 4-H events,” and “Supporting 4-H field offices.” Individuals, regardless of gender, marital, income, and employment status, and within the 50 -59 age group, were “not at all” interested in roles for which 4-H currently needs more volunteers, such as “Leading 4-H clubs during out of school hours;” “Recruiting 4-H adult or youth volunteers,” or “Promoting 4-H via the media.” The married, males, and all ages were not interested in: “Judging 4-H events;” “Chaperoning 4-H events;” “Sharing a skill/hobby with 4-H youth;” “Supporting 4-H field offices;” or “Assisting at other 4-H events.”

- *“I find volunteering a very fulfilling, satisfying endeavor but I tend to look for volunteer opportunities that are close to home and directly impact my daily life and that of my family’s.”*

It is surprising that 4-H programs were not more highly rated given the high interest expressed by respondents in working with youth. For example, in addition to the high interest expressed in working the youth in and out of school which has already been discussed, there was significantly combined moderate and high interest indicated in “Teaching” for the employed (71%) and the retired/working (75.4%) with less interest indicated by the retired/not working (55.5%). The aforementioned data highlights the need to create new program delivery methods or re-frame traditional program structures in order to present 4-H programs differently to those interested in working with youth. Recruitment of campus based Baby boomer + volunteers may pose an initial challenge for 4-H internally, yet also help stimulate the re-evaluation and redesign of the types of roles and tasks volunteers are asked to perform so that 4-H can continue to serve more youth.

B. Possible Innovations to enable Massachusetts 4-H Boomer + Recruitment:

As this survey was intended in part to inform new approaches to 4-H recruitment of Boomer + volunteers, the following recommendations are offered for consideration by Extension, 4-H and Volunteer leadership.

1. **Publicity and Marketing.** It is a well-known saying in Massachusetts 4-H circles, and in other states as well, that the 4-H Program is “a best kept secret.” Survey findings suggest that the program may need to re-educate the boomer cohort about the full range of 4-H youth programming now available in order to recruit boomer+ volunteers. A benefit of the Massachusetts Service Alliance grant for 4-H was the ability to create new marketing materials to enable boomer + volunteer recruitment. (*See Appendix F: 4-H Boomer Volunteer Recruitment Materials.*) Other inroads could also be made by Massachusetts 4-H in the marketing of their programs.

- Develop boomer+ oriented advertisements, displays, billboards or local radio spots** to appeal to the idealistic, social, and environmental interests of campus affiliated retired and alumni boomers in a local community, advertised to college staff populations via campus services such as campus radio or electronic news venues.
- Create promotional methods and materials to emphasize volunteer teaching, advisory committee and educational positions,** the altruistic benefits that provision of these volunteer services these bring, and offer the amenities and flexible, episodic volunteer roles valued by this group.
- Use National 4-H Recruitment materials** that deliberately build upon the program’s traditional, wholesome agricultural image yet present a more diverse and contemporary spin (such as an environmental focus) to boomer populations, urban and suburban youth and

families. These could be used in tandem with new Massachusetts boomer materials in future recruitment drives along with referrals from friends, personalized letters to potential recruits, newspaper articles, and e-mail appeals.

- d. **Advertise volunteer opportunities directly on each of the UMass five campuses** through postings to a centralized volunteer office. This might enable recruitment of the 50-62 year old groups who are more fluent with e-mail and Web technologies. Such efforts could help 4-H bring in the special skills and perspectives of the boomer + cohort and contribute to the rejuvenation of the Massachusetts 4-H volunteer base.
- e. **Emphasize 4-H technology, arts, and environmental related volunteer service** opportunities in recruitment campaigns. New boomer+ volunteers could be sought to develop and run these types of programs while continuing with the tried and true activities that have been the foundation of 4-H programming for so many years.

2. **Increase access to underserved, diverse urban and suburban communities.** Massachusetts is not alone among the states in becoming less rural and comprised of more suburban and urban audiences who are only vaguely familiar with 4-H.

- a. **Consider re-activating 4-H after school programs at school sites** to better serve suburban and urban communities and recruit more diverse volunteers in their communities. This could help contribute to more equal program access for youth from diverse racial and ethnic communities and add new groups of boomer volunteers interested in working with youth in schools or convenient out of school locales. Work with school boards and parent groups. Consider targeted recruitment of retired/working teachers and grandparents.
- b. **Examine the best practices of highly successful independent non-profits that serve children.** Consider 4-H's market niche, investigate successful marketing and recruitment strategies, and funding sources. As current Department of Labor statistics assign a monetary value to volunteer work of \$18.77 per hour, increased competition among non-profits for the ever-more-highly-valued volunteer does not show signs of decreasing in the near future.

3. **Restructure staff and volunteer roles.**

- a. **Diversify all volunteer service opportunities** to accommodate shorter-term or episodic service for older individuals.
- b. **Reorient staff roles** so that some time-consuming duties they currently perform are assigned to volunteers or program committees to develop and manage while staff assume more responsibility for volunteer recruitment and publicity, fundraising, higher level management duties and fiscal oversight.
- c. **Develop a more detailed skills survey** for new and current volunteers as part of a recruitment appeal or enrollment packet. Ask open ended questions about which particular talents or roles are of interest and emphasize tailoring work to the volunteer's preference. For example, some boomer volunteers could be recruited for their computer expertise to help manage program logistics that 4-H clerical staff now perform, such as youth and club enrollment, or assist Educators and Program Assistants in screening and orienting new volunteer club leaders if they have human resource experience or management skills.
- d. **Create a stipended volunteer coordinator position** in each region to enhance more targeted recruitment of corporate volunteers, 4-H grandparents and 4-H alumni through personal letter appeals and friend referral networks. This increased volunteer operational support would be useful to Educator staffs who now manage 4-H programs in multiple counties.
- e. **Develop a new focus for volunteer advisories** that would help them develop ways to enhance local 4-H volunteer recruitment, training and provision of on-going support services to new volunteers and to keep 4-H volunteers engaged in its programs over time. This would help new volunteers avoid being lost in the sometimes complex variety of 4-H programs, feel

more welcomed given the already established relationships within the 4-H community, and remain a part of the Massachusetts 4-H volunteer community over time.

- f. **Partner with Massachusetts 4-H Foundations** to enlist their current or veteran members in creating organized efforts to reach out to prospective corporate volunteers with new social events and contacts.
- g. **Create community based recruitment drives** where experienced volunteers personally invite a boomer+ friend to join 4-H as a volunteer, help match these individuals with the flexible roles that suit their interests yet meets that programs operational needs, and mentor them over time.
- h. **Form special project teams** of boomer+ volunteers who engage in short-term service projects during a particular season each year. Volunteers could receive or conduct the training, and be given the authority to organize and manage programs and events over time. Self-directing boomer volunteers might also then be more willing to lend their experience to human resource tasks and help with office communications with the public as part of regular program cycles, for example during enrollments.
- i. **Obtain additional grant funding for volunteer recruitment.** The task of setting standards, properly training and supervising new volunteer “middle managers” initially would require more Educator attention up front. This initial phase would benefit from the acquisition of other grant or foundation funds to help develop a unified 4-H recruitment and training initiative across the state. Some of this report’s ideas and other recommendations developed by 4-H leadership, staff and volunteers could be combined to shape this initiative. If new volunteer roles are designed and maintained through on-going contact with and cultivation of the volunteers, and if this goal is accomplished through the creation of more stable volunteer teams to handle such tasks, staff time could be saved for other priorities and specialized tasks.

C. Extension Programs:

It is of interest that the employment status of the survey respondents also influenced their interest in other Extension programs. When compared with the fully retired and those who were employed, Retired/working individuals showed more combined high and moderate interest in other Extension & Outreach programs: Agriculture and Landscape (46.2%), Fine Arts and Arts Extension (49.2%) (Arts Extension is part of University Outreach), and Natural Resources and Environmental Conservation (63.2%), and Nutrition Education Programs (34.4%). For 4-H these findings may also indicate that there could be benefits in integrating high interest Extension content more fully in 4-H offerings. It also suggests that a youth focus adds additional interest to other Extension programs that are seeking volunteers from campus boomer + groups. There is a general need to increase public awareness regarding the full range of current Extension Programs and activities.

- *“I do believe in the Home Extension Service, but I'm not sure if it is available where I live or even exists.”*

25% of all respondents, regardless of age, gender or marital status were interested in conducting educational workshops for Extension. Conducting workshops were also significant among the retired/working and specifically preferred among the \$61,000 to \$100,000 income level group. While the retired/working and those above \$20,000 income levels were somewhat interested in serving specifically on Extension advisory boards, married individual and those between the ages of 50 to 59 were not.

30% of single females, ages 50 to 59, and those with incomes of \$20,000 or less were interested in supporting Extension’s Agriculture and Landscape Program while 50% of the females, regardless of marital status and across all income levels were interested in supporting Extension’s Natural Resources and Environmental Conservation Program. Married females, ages 50 to 59,

and about one-third of those across all income brackets were interested in supporting Extension's Nutrition Education Program, while 40% of the single females, the same age range, and those from the lowest and highest incomes were interested in supporting Fine Arts/Arts Extension.

VI. Centralized Campus Volunteer Information and Recruitment Model:

Survey findings within this summary report have also been used to suggest a transferable model of campus-affiliated alumni and retiree volunteer recruitment which could be used by other colleges and universities. Survey results indicate the campus associated boomer volunteer respondent group preferred to be contacted by friends, personal letter and the web and were amenable to contact from either the Alumni or Retired Professional Staff Associations, other community groups, or a centralized volunteer office based on campus.

- *"It's great to know that you're working on increasing contact with alumni and making a connection with them, their passions, their vocations and avocations and their UMASS!!!"*

The model suggested here features a centralized "one-stop- shopping" volunteer opportunity intake function based within one campus office that could serve communities across the state by enabling contact with university staff and potential volunteers. This organizational unit would offer a centralized database and Web-based posting opportunities with access available to all campus departments as well as affiliated external volunteer agencies. Groups seeking volunteers would be authorized to advertise volunteer opportunities through various clearance criteria, perhaps by being a member of a United Way type of charitable giving list or an employee contribution campaign that are often found at colleges. University departments and non-profit groups could move through an established and vetted protocol to both publicize service opportunities and post contact information for those alumni, retiree, staff or student volunteers who wanted more information on various volunteer service positions. Faculty and students currently use a similar model to link students with various community service opportunities as part of their community service learning requirements.

UMass departments, with the implementation of such a model, would have the advantage of appealing to a larger group beyond their former departmental alumni when advertising their volunteer needs -- both to other campus departments and offices, as well as to non-profits and the community at large. The UMass Amherst Alumni Association's existing volunteer function might choose, if resources permitted, to match their interested alums and retirees with the opportunities available. Alternately, volunteers could contact the sponsoring organization themselves if they wished to find out more about a given service position.

The UMass Amherst Alumni Association has expressed initial interest in exploring the potential for this model given its existing volunteer structures and database capacities. This survey and the idea of a centralized volunteer posting function will be presented to the Alumni Association's leadership, board, and Volunteer Advocacy and Public Affairs committee for further review and discussion in the near future. If the requisite interest, resources, and commitment of the Alumni Association, University administration and the departments for implementing a campus-based volunteer notification and recruitment function should prove forthcoming, the Alumni Association might then choose to provide this valuable outreach service, as could other alumni associations for their own colleges or universities across the state and country.

VII. Conclusion:

Extension's "Volunteer Survey of UMass Alumni and Retired Professional Staff" yields specific and interesting information useful to a variety of groups interested in capturing the considerable volunteer skills of the boomer + age group. Its findings indicate that many of the traditional service tasks for which non-profits currently seek boomer+ volunteers are not aligned with these campus affiliated groups' expressed interests, and that many long-standing marketing approaches, program formats or volunteer organizational structures would need to be changed to increase recruitment of these individuals. Respondents in the survey show a limited willingness to take on traditional clerical or other support roles or to assume work in much needed areas like fundraising, publicity or recruitment. The high interest that respondents expressed in brief or episodic terms of service, versus traditional volunteer roles requiring a longer time commitment, suggests the need to re-define volunteer roles as well as staff work priorities.

The high level of altruism these campus affiliated boomer + respondents indicated as their major motivation to volunteer, points out that organizations could benefit by making the shift toward different marketing approaches which emphasize both altruistic outcomes as well as the provision of opportunities to stay involved with others in their communities. This group's strong preferences to be contacted about volunteer opportunities through a local network, by a friend's referral or by e-mail/web technologies provides information on the how to recruit and retain boomer+ professional retiree and alumni volunteers. Others indicated that if groups kept in touch with them over time, some would reconsider accepting an invitation to volunteer.

- *"As a recent retiree, I simply want to enjoy the first "free time" that I have had since I began working part-time in grade 7...In a few years, I'll get back to wider community issues."*
- *"My life is active and full presently. When I retire in 8 1/2-9 years I plan to volunteer or work (or both) at least 20 hours per week mainly to keep myself busy, socialize, and active physically and mentally."*

Demographic data from the survey indicates that there are indeed differences among this boomer + group based on income, gender, age, marital status, educational level and employment status. For example, the finding that full retirees are less interested in any type of volunteer activity suggests that some retired respondents do indeed wish to stay out of public life, which calls into question the hope that large groups of older citizens will fill a shortage of positions in non-profits or businesses in the future. The need to keep working in retirement for economic reasons, also suggests that volunteer and work possibilities may be enhanced by offering some compensation, as not every boomer + individual will be able or willing to volunteer without pay.

- *"Retired - means just that!"*
- *"I have donated thousands and thousands of volunteer hours to school, youth groups, service agencies, and more, and now need to concentrate my efforts on cash generating endeavors."*

Respondents to this survey clearly want their volunteer work to be related to noble motives, such as contributing to society, environmental causes, teaching, sharing their skills, and working with young people and college-age students in a variety of settings. By retooling recruitment approaches, marketing messages, and their organizational and volunteer structures, non-profits can begin to offer more opportunities for active participation and choice for the boomer+ population. Such methods could better ensure that this dynamic campus affiliated group of mature Americans is aware of the need for their contributions as well as motivated to share their ideas and skills to benefit many non-profit groups and the people they serve.

Appendix A: Project Organizational Partners:

UMass Extension is part of University Outreach at the Amherst campus. **Massachusetts 4-H** is its youth development program and one of four departments in Extension which also include Agriculture and Landscape, Natural Resources and Environmental Conservation, and Nutrition. All programs receive both state and USDA funding through the Cooperative States Research, Education, and Evaluation System (CSREES). In 2005, in the face of legislative budget cuts to the University system that heavily impacted 4-H, a benchmarking study was conducted to suggest new methods and practices to streamline and increase the effectiveness of several management areas within 4-H.

Among other initiatives, the study recommended targeted marketing and recruitment directed to the baby-boomer + retiree cohort in order to shore up dwindling volunteer numbers, a national trend based, in part, on the increase of families in which both parents work. The 4-H Program relies heavily on volunteers to deliver its premier programs to over 26,000 Massachusetts youth and their families and to support the efforts of University based Extension Educators. This small group of staff provides curriculum, program/event and management support to the 4-H volunteers, advisories and partnering non-profits across the state, including five 4-H Camps, two Foundations and ten Fair associations.

The Massachusetts 4-H Foundation, encouraging and supporting this initiative, contributed staff time and financial administrative structures to the grant project and provides ongoing support for youth and volunteer recruitment and retention within Massachusetts 4-H. As part of the Volunteer Baby Boomer + survey research, a special **4-H Review Team** was formed of staff and 4-H volunteers from across the state. The group met periodically throughout the project's duration to consider cultural trends, boomer + age groups' characteristics, as well as marketing approaches and information presented at a valuable Massachusetts Service Alliance training session. It examined 4-H volunteer exit interview data as well as this survey's findings. The team recommended new ways to enhance the types of volunteer roles, opportunities, and support 4-H offers to volunteers to meet the expressed needs of the boomer cohort, such as a potential new volunteer coordinator in each region and joint club leader roles. It also suggested increased targeted marketing to baby boomer + volunteer groups. As a result of the project, new informational 4-H recruitment articles will appear in newspapers across the state, with personalized recruitment letters sent to potential 4-H volunteers including 4-H alumni, corporate pro-bono boomers, boomer singles and grandparents. A customized boomer oriented poster and bookmark campaign will also be used to recruit volunteers at special events.

The UMass Amherst Alumni Association partnered in the study by providing personal links with several members who participated in pre-assessment interviews to determine the types of questions to be asked and topics to be covered in the survey. It also provided stationary and mailing labels derived from database listings of its members within the baby boomer + age group, focusing specifically on alums still residing in Massachusetts with graduation dates from 1960-1977, and co-authored letters to encourage its members to respond. Member names and addresses were kept strictly confidential by the Association and were used only for the purpose of the survey and reminder postcard mailing. **The UMass Professional Staff Retiree Association** membership represents a talented, knowledgeable group of retired individuals interested in maintaining their connections with the campus and their local communities through volunteering and offering service to non-profit groups. Confidential mailing lists were also offered by this group, and personalized letters encouraging participation were sent with the survey.

Appendix B:

II. Project Goals:

GOAL A: Extension's Massachusetts 4-H Program, in collaboration with the Massachusetts 4-H Foundation, Inc., will conduct survey needs analysis on the interests of campus affiliated alums and retirees. From the findings, it will also suggest a joint, transferable model of baby boomer-plus volunteer recruitment on campus with the cooperation of the UMass Amherst Alumni Association, the Retired Professional Staff Association and the Massachusetts 4-H Foundation.

1. Needs assessment survey categories were first shaped through interviews with alumni. The survey was then designed to collect information about:
 - a. The varieties and types of volunteer roles, opportunities, skills sets and organizational groups in which boomer + campus community retirees and alumni are most and/or least interested.
 - b. The motivations, incentives and contact methods most likely to encourage baby boomer-plus/ retired campus individuals or alumni to volunteer.
 - c. The support structures necessary to make campus retirees' volunteer experience with UMass based groups, 4-H and non-profits a quality, successful experience and to help retain volunteers.
2. With partners, derive a suggested structure and data/Web based methods to:
 - a. Centralize information about volunteering for interested baby boomer, retiree, alum or student groups interested in campus or community service opportunities
 - b. Develop formal processes for university departments, campus-based groups and external non-profits to share their available volunteer position openings via an on-line system
 - c. Create access for potential volunteers who express interest in particular opportunities to contact the organization they are interested in to explore volunteer positions.

GOAL B: Begin to redesign the Massachusetts 4-H volunteer management system based on the needs, interests, and suggested support structures derived from campus retiree baby boomer + needs assessment study findings.

1. Review Team identifies the strengths and weaknesses of current Massachusetts 4-H volunteer management system (e.g.: service descriptions, codes of conduct, screening requirements and volunteer support mechanisms).
2. Review Team examines the findings of the needs assessment study and establishes recommendations leading to the redesign of customized baby boomer-plus Mass 4-H volunteer opportunities, recruitment and marketing strategies, and management structures.
3. Extension and Massachusetts 4-H staff consider the Review Team's recommendations and develop innovations for Massachusetts 4-H organizational structures, volunteer management system, recruitment strategy and marketing materials.
4. Staff plans for systematic 4-H recruitment of new boomer-plus volunteers in each region.
5. Extension/4-H develops personalized marketing materials including news articles, personal letter campaigns to boomer + identified market segment groups, volunteer recruitment posters for display at numerous events and bookmarks identifying specific volunteer activities and available positions.
6. 4-H and Extension share the model and research with other organizations and colleges, the Cooperative Extension system, National 4-H Council, and other volunteer agencies via Websites, research reports and conference presentations in conjunction with the Massachusetts Service Alliance.

Appendix C: Volunteer Survey of UMass Alumni and Retired Professional Staff

Percentages and Mean Data

Total Number of Respondents: 423 = 51 Retired Professionals; 372 Alumni Association Members

1. Are you affiliated with any of the following campus organizations? **(select all that apply)**
- 29.7% UMass Amherst Alumni Association 7.7% Retired Professional Staff Association
 1.5% Massachusetts 4-H Program 1.2% UMass Extension Agriculture & Landscape
 0.5% UMass Extension Nutrition Education 0.7% Extension Natural Resources and Environmental Conservation
 7.7% Other - (see appendix for all 'other' responses)

2. In the last 12 months, have you volunteered for the following?
- A UMass sponsored activity/event **8.3%** Yes **91.7%** No If yes, specify _____
 A community sponsored activity/event **48.3%** Yes **51.7%** No If yes, specify _____

3. In the next year, do you plan to volunteer for the following?
- A UMass sponsored activity/event **7.2%** Yes **49.7%** No **43.1%** Don't Know If yes, specify _____
 A community sponsored activity/event **42.6%** Yes **22.1%** No **35.4%** Don't Know If yes, specify _____

4. To what extent would the following factors motivate you to volunteer for university sponsored or community program/events? **Circle a number from 1 (not at all) to 3 (very much).**

	not at all	somewhat	very much	Mean
Recognition	73.7%	23.5%	2.8%	1.29
Compensation	74.6%	18.6%	6.8%	1.32
Contact with others	14.2%	52.0%	33.8%	2.20
Contributing to society	9.4%	27.9%	62.7%	2.53
Opportunity to share my skills and knowledge	12.7%	36.0%	51.3%	2.39
Working for an important cause or purpose	9.8%	23.8%	66.4%	2.57
Physical activity	36.0%	49.1%	14.9%	1.79
Mental stimulation and challenge	16.7%	46.6%	36.7%	2.20
Connection to personal skills or interests	14.3%	44.3%	41.4%	2.27
Networking for paid work opportunities	70.4%	23.3%	6.4%	1.36
Other _____	X			

5. What type of roles/tasks are you likely to volunteer for? **Circle a number from 1 (not at all) to 3 (very likely).**

	Not at all likely	Somewhat likely	Very likely	Mean
Advocacy/legislative activities	63.2%	28.3%	8.6%	1.45
Event planning/management	53.5%	38.0%	8.5%	1.55
Fundraising	71.5%	23.4%	5.1%	1.34
Working with university students	38.9%	42.3%	18.8%	1.80
Working with youth in school settings	34.9%	39.1%	26.0%	1.91
Working with youth in out-of-school settings	38.2%	39.3%	22.6%	1.84
Clerical/Administrative support	62.6%	29.2%	8.1%	1.46
Publicity or marketing	71.5%	23.2%	5.2%	1.34
Public speaking	60.6%	34.0%	5.9%	1.51
Providing transportation to events or appointments	60.1%	34.0%	5.9%	1.46
Serving on committees or boards	35.9%	43.8%	20.3%	1.84
Leading outdoor activities	60.2%	28.9%	10.9%	1.51
Research or writing	62.8%	25.6%	11.7%	1.49
Financial services (Accounting)	87.7%	8.7%	3.6%	1.16
Risk or legal services	93.9%	4.2%	2.0%	1.08
Building or trades related work	76.2%	18.3%	5.5%	1.29
Providing leadership (to a group or for an event)	47.0%	41.7%	11.3%	1.64
Other	X			

6. How frequently would you be interested in volunteering for university sponsored or community programs and events? **(select one)**

3.4% Several times/week **7.6%** Once a week **17.2%** 2-3 times/month
26.2% Once a month **45.6%** Less than once a month

7. How many total hours per month would you be interested in volunteering for university sponsored or

community programs and events?

Mean = **6.97** hours/month

8. To what extent would the following incentives increase the likelihood that you would volunteer for university sponsored or community programs and events? **Circle a number from 1 (not at all) to 3 (very much).**

	Not at all	Somewhat	Very much	Mean
Free parking	29.2%	33.6%	37.2%	2.08
Pleasant work space	21.9%	48.2%	29.9%	2.08
Free tickets to events sponsored by the organization	32.5%	42.4%	25.1%	1.93
Reimbursable travel expenses	41.0%	38.6%	20.4%	1.79
Free/Discounted meals	37.0%	43.8%	19.2%	1.82
Free/Discounted lodging	34.7%	42.4%	22.9%	1.88
Other _____	X			

9. How would you prefer to be informed about opportunities to volunteer for university sponsored or community programs and events? **Circle a number from 1 (not at all) to 3 (very much).**

	Not at all	Somewhat	Very much	Mean
Group Luncheon	57.5%	36.6%	5.9%	1.48
Personal (face-to-face) request	49.1%	36.4%	14.5%	1.65
Personal Letter	16.6%	47.4%	36.0%	2.19
Personal Phone call	50.6%	30.7%	18.7%	1.68
Web/Email	30.6%	37.0%	32.3%	2.02
Local Newspaper/TV/Radio	54.0%	36.1%	9.9%	1.56
Other _____	X			

10. To what extent would you be receptive to offers to volunteer (for university sponsored or community programs and events) from the following sources? **Circle a number from 1 (not at all) to 3 (very much).**

	Not at all	Somewhat	Very much	Mean
UMass Amherst Alumni Association	36.9%	49.9%	13.2%	1.76
Retired Professional Staff Association	62.1%	27.7%	10.2%	1.48
Other volunteer organizations	33.8%	54.7%	11.5%	1.78
University departments	40.2%	48.6%	11.2%	1.71
Office of the University Chancellor	56.3%	32.7%	11.1%	1.55
Fraternity or sorority Group	86.0%	10.2%	3.8%	1.18

Friends	22.3%	47.6%	30.1%	2.08
University affiliated volunteer office	42.4%	45.6%	12.1%	1.70

11. Which of the following skills or interest areas could you contribute to university sponsored or community programs and events? **Circle a number from 1 (not at all) to 3 (very much).**

	Not at all	Somewhat	Very much	Mean
Financial management skills	75.3%	18.3%	6.4%	1.31
Technical computer skills	76.0%	19.9%	4.0%	1.28
Fund raising	75.0%	20.7%	4.3%	1.29
Government relations	72.2%	23.2%	4.6%	1.32
Human resource management	59.4%	33.1%	7.5%	1.48
Marketing	69.5%	24.1%	6.3%	1.37
Non-profit management	70.1%	24.1%	6.3%	1.36
Working with youth	34.1%	41.2%	24.7%	1.91
Legal skills	92.8%	5.5%	1.7%	1.09
Risk or insurance issues	92.2%	6.1%	1.7%	1.10
Teaching/Education	33.8%	39.2%	27.0%	1.93
Developing publications (Graphics design and editing)	74.8%	19.6%	5.6%	1.31
Other _____	X			

12. Are you interested in volunteering for the events or organizations listed below?

University student tours	6.9% Yes 93.1% No	Alumni or Retiree campus groups	28.2% Yes 71.8% No
School reunion committees	9.2% Yes 90.8% No	University fund raising events	9.7% Yes 90.3% No
Cultural or arts groups	30% Yes 70% No	Other fundraising groups	6.9% Yes 91.3% No
Civic organizations (Lions, Rotary)	17.1% Yes 82.9% No	Youth sports or recreation	24.8% Yes 75.2% No
Senior groups	33.7% Yes 66.3% No	Adult recreation/athletic programs	27.5% Yes 72.5% No
School/educational organization	42.6% Yes 57.4% No	Political organization	16.3% Yes 83.7% No
Environmental issues	39.6% Yes 60.4% No	Animal Care organizations	21.5% Yes 78.5% No
Local municipalities	28.7% Yes 71.3% No	Faith-based organizations	13.9% Yes 86.1% No

Neighborhood action groups	25.5% Yes 74.5% No	Walkathons	19.3% Yes 80.7% No
Hospital/health center	29.0% Yes 71.0% No	Veterans affiliated groups	16.3% Yes 83.7% No

13. One major outreach and community-based program of the University of Massachusetts is UMass Extension. UMass Extension is operated by UMass Amherst Outreach and works with the academic schools, colleges and departments of the University of Massachusetts Amherst to apply university teaching and research to benefit communities throughout the Commonwealth, the nation and the world.

In addition to the Massachusetts 4-H Program, UMass Extension includes programs in Agriculture and Landscape, Natural Resources and Environmental Conservation, and Nutrition Education. The Division of University Outreach also offers Arts Extension programs.

To what extent would you be interested in the following volunteer opportunities with UMass Extension? **Circle a number from 1 (not at all) to 3 (very much).**

	Not at all	Somewhat	Very much	Mean
Serving on Extension advisory boards	74.9%	18.7%	6.4%	1.32
Judging 4-H events	85.8%	9.7%	4.5%	1.19
Chaperoning 4-H events	87.7%	10.3%	2.0%	1.14
Sharing a skill/hobby/craft with 4-H youth	78.1%	17.9%	4.0%	1.26
Leading 4-H clubs during out of school hours	93.4%	5.7%	0.9%	1.07
Recruiting 4-H adult volunteers	95.4%	4.0%	0.6%	1.05
Recruiting 4-H youth	94.5%	4.6%	0.9%	1.06
Conducting educational workshops	71.8%	23.6%	4.6%	1.33
Promoting 4-H via the media	93.7%	5.7%	0.6%	1.07
Supporting 4-H field offices	83.2%	14.5%	2.3%	1.19
Assisting at other 4-H events	79.3%	17.9%	2.9%	1.24
Supporting the Extension Agriculture and Landscape Program	68.2%	26.6%	5.2%	1.37
Supporting the Extension Nutrition Education Program	71.1%	24.4%	4.6%	1.34
Supporting Fine Arts/Arts Extension	61.7%	29.7%	8.6%	1.47

Supporting the Extension Natural Resources and Environmental Conservation Program	54.8%	33.2%	11.9%	1.57
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Your answers to the general questions below will help us to understand and analyze results.
All responses are confidential. Results will be reported anonymously and for groups only.

14. Current Employment Status:

44.6% Employed or self-employed full-time	28.5% Retired not working
4.8% Employed or self-employed part-time	3.8% Other:
2.5% Retired, full-time employment	
15.9% Retired, part-time employment	

15. Gender:

47.8% Male 52.2% Female

16. Age:

0.3% 49 or younger 50.1% 50-59 29.5% 60-69 15.1% 70-79 5.0% 80+

17. Marital Status:

8.7% Single and never married	73.3% Married
0.3% Separated	6.9% Widowed
9.2% Divorced	1.8% Living with a partner/companion

18. Level of education:

0.8% High School degree	2.3% 2 years of college
35.2% Bachelor's degree	59.2% Postgraduate/Masters/Doctoral
2.5% Other: please specify	

19. Race or ethnicity:

0.3% Hispanic/Latino	1.0% Black (not Hispanic)
96.9% White (not Hispanic)	0.5% American Indian/Alaska Native
0% Asian or Pacific Islander	1.3% Other:

20. Income:

5.4% Less than \$20,000	13.9% \$21,000- 40,000
20.1% \$41,000- 60,000	21.2% \$61,000 – \$80,000
14.7% \$81,000 - \$100,000	24.6% \$100,000 and over

Use the space below to provide any additional thoughts you may have on volunteering for university sponsored or community programs/events.

If you wish to request the study's statistical data tables, please contact the survey author with your request at the contact information below.

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Appendix D: Demographic Data Tables

1. Age
2. Gender
3. Income
4. Educational Level
5. Employment Status
6. Marital Status

Appendix E: Percentage Interest Level in Volunteering for Specific Activities from Entire Respondent Group:

Most Interest in Activities:

- 42.6% ~ school/education organization
- 39.6% ~ environmental issues
- 33.7% ~ senior groups
- 30.0% ~ cultural or arts groups
- 29.0% ~ hospital/health center
- 28.7% ~ local municipalities
- 28.2% ~ alumni or retiree campus groups
- 27.5% ~ adult recreation/athletic programs
- 25.5% ~ neighborhood action groups
- 24.8% ~ youth sports or recreation

Least Interest in Activities:

- 93.1% ~ university student tours
- 91.3% ~ other fundraising groups
- 90.8% ~ school reunion committees
- 90.3% ~ university fund raising events
- 86.1% ~ faith based organizations
- 83.7% ~ political organizations
- 82.9% ~ civic organizations
- 80.7% ~ walkathons
- 78.5% ~ animal care organizations
- 75.2% ~ youth sports or recreation

Appendix F: New Marketing Materials Created for Massachusetts 4-H
Boomer+ Volunteer Recruitment Effort:
Front & Back of Bookmarks



Woodstock was then... Livestock is now!

Looking for new ways to expand your mind? Why not shine your light as a 4-H volunteer? 4-H opens the door to kids, animals and intergenerational fun!

Give us a call today, and we'll help you create a flexible volunteer role that matches your skills, interest and lifestyle.

Massachusetts 4-H
800-374-4446 • mass4h.org



Lamb is not dyed — photo digitally altered to depict coloring.



Shine your light as
a 4-H volunteer.
Make a difference
in the world, one
child at a time.

As a 4-H volunteer, you make real connections — sharing your life experience and knowledge with children and teens. Your time, interests, and passions will help 4-H youth learn practical life and leadership skills. Volunteering opportunities are diverse and give you a chance to work in your local community.

University Educators, 4-H volunteers and youth across the state can't wait to welcome you into the 4-H community!

4-H is one of the largest youth development programs in the nation and is part of UMass Amherst Extension. www.umassextension.org



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Project in part sponsored by the Massachusetts Service Alliance and the Massachusetts 4-H Foundation.



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Those who wish to file a complaint of discrimination are urged to contact the Extension Director to first discuss the situation and determine remedies, or to request the appropriate University, state or federal complaint procedures and forms.

Contact information:

UMass Extension, University of Massachusetts
101 University Drive
Ste C-1, Amherst, MA 01002
telephone: 413-545-4800, 8:30- 4 p.m.
All such calls will be promptly responded to.