

ALL
WORKSHEETS

10 STEPS FOR ENGAGING ADULTS 50+

A RESOURCE OF THE
GEN2GEN LEARNING HUB

Developed by

Encore.org's Gen2Gen campaign

and

The Alliance for Strong Families
and Communities' Second Acts Initiative



ACTION WORKSHEETS APPENDIX

This section includes all of the Take Action worksheets in the guide.

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ACTION WORKSHEET

Step 1. Age-Inclusive Environments

Check which of these statements reflects your current organizational practices or ones you will adopt as part of your plan to intentionally engage adults 50+.

If you have questions about how to implement anything on this list, don't forget that you can ask questions in the [Gen2Gen Champions Group!](https://bit.ly/gen2genchampions) (bit.ly/gen2genchampions)

AGE-INCLUSIVE ENVIRONMENT CHECKLIST

CONTEXT

- Everyone understands our intention to be welcoming to people of all ages.
- This intention is clearly expressed in our policies, values, behaviors, on-boarding, etc.
- Everyone's role is explicitly connected to a common outcome, mission or goal.
- Every position description defines responsibilities in relation to mission.
- Every worker (paid or unpaid) knows how their work relates to others on the team.

COMMUNICATION

- Honest, immediate and transparent communication is a clearly stated value.
- Communication styles and practices align with individual preferences (e.g., face-to-face, email, text etc.)
- Preferred communication styles are covered during our on-boarding process.
- Organizational jargon is clearly explained and generation-specific jargon is avoided.
- Intergenerational connections are encouraged to facilitate open communication.



LEARNING

- New information is presented in ways that align with age-specific learning styles.
- Training designed for younger adults is adapted to suit the learning style of adults 50+.
- Learning and development opportunities are available for team members of all ages.
- Adults 50+ are recognized as developmental resources for the organization.

CROSS-MENTORING

- Opportunities exist for people of all ages to learn from one another.
- A cross-mentoring program identifies specific skills and developmental goals to guide the learning process.

ACCESSIBILITY

- The physical work environment accommodates people of all abilities.
- Adjustments are made as needed for mobility, lighting, sound and other factors that can be anticipated for overall accessibility and as they arise for older workers.

RESPECT

- Staff, volunteers and others on our team participate in training about bridging connections across generations and cultivating empathy.
- Everyone is expected to accept, value and include others and to refrain from assumptions about abilities or interests based on age.



ACTION WORKSHEET

Step 2. Role Design

Indicate where the roles you currently have available fit on this chart. Do they fall into more than one category so that individuals have a variety of ways to engage? Can you redesign or add to these roles to make them more attractive to a broader range of adults 50+?

CHARTING THE RANGE OF ROLES YOU OFFER

STAGE	PAID STAFF		UNPAID VOLUNTEER	
	Direct Service*	Capacity Building**	Direct Service*	Capacity Building**
STAGE FOUR: Champion <i>Advocate for your cause and bring new recruits to your program</i>				
STAGE THREE: Committed <i>Step into sustained roles that expand and deepen your organization's mission</i>				



<p>STAGE TWO: Casual <i>Ready to get more involved and try new ways to engage; commit to projects, short service stints with a clear goal or end date, potentially repeat over time</i></p>				
<p>STAGE ONE: Curious <i>Aware and interested but not yet sure about commitment; willing to try something easy, may engage in activities more than once</i></p>				

* Direct Service = Roles working directly with children and youth

** Capacity Building = Roles that help build the capacity of the organization and further its mission (administrative, strategic, etc.) but do not directly interact with young people



ACTION WORKSHEET

Step 3. Position Descriptions

Use this checklist to test whether your position descriptions include information that will appeal to the interests and preferences of adults 50+.

POSITION DESCRIPTION CHECKLIST

DEMOGRAPHIC TARGET

- Use language that is relevant to adults 50+ (value of intergenerational connection, giving back, etc.) .
- Highlight the value you see in life experience and skills developed over time.
- State that the role is designed for adults 50+, if relevant.

SOCIAL PURPOSE

- Include your organization's mission and social purpose.
- Articulate the social impact of the position.
- Include impact of the role on young people, the organization, the local community.

MEANINGFUL ENGAGEMENT

- Describe opportunities for connection with clients, partners, staff, peers, etc.
- Indicate specific needs, challenges or opportunities to be addressed through the role.
- Refer to the potential personal benefits of the role (motivation, connection, impact, etc.).

LEARNING & GROWTH

- Clearly define the job tasks and expectations.
- Outline the variety of specific skills required.
- Offer opportunities to build skills and experience.



AUTONOMY

- Include opportunity for discretion and decision-making.
- Allow for flexible work conditions (hours, location, etc.).
- Identify reporting relationships and how they work.

CONTEXT

- Indicate how this role fits into the organization and its mission.
- Explain opportunities for collaboration (teamwork, mentoring, etc.).
- Cite ways that staff/volunteers will be supported by the culture of the organization.



ACTION WORKSHEET

Step 4. Outreach

Use this worksheet to tailor messages, materials, messengers, and methods for the positions you're looking to fill. Note: Different roles will likely require different strategies. Use a separate checklist for each role you are recruiting for.

OUTREACH PLANNING CHECKLIST

MESSAGES

Role: _____

- Place most important idea first
- Explain opportunity to make a difference
- State explicitly why you seek adults 50+
- Include emotional appeal to impact
- Include intellectual appeal to qualifications
- Use stories that inspire
- Use simple, engaging language and tone
- Include clear call to action
- Test well with target audiences

What messages will we test for this role?

MATERIALS

Role: _____

- Use images that target audience can relate to (consider diversity, gender, etc.)
- Grab attention through graphics, layout, color, clever headlines, etc.
- Visually relate to each other, regardless of platform (paper, online, giveaways, etc.)
- Simple, readable, visually appealing
- Include links to website, position, application
- Test well with target audiences

What materials will we use for this role?



MESSENGERS

Role: _____

- Look like those you want to engage
- Have local connections and knowledge
- Have compelling stories to tell
- Can speak from personal experience
- Listen well to “get” and address concerns
- Come across as authentic and genuine
- Prepared to “make the ask”
- Available on video, online, by telephone, etc. as well as in person

Who would make a great messenger to get the word out about this role?

METHODS

Role: _____

- Feature word of mouth and personal connection, the best way to engage
- Include online postings
- Include social media
- Include flyers in community gathering spots
- Include events attended by your audience
- Include partner organizations who can spread the word
- Include champions who will endorse you
- Include local papers and ads

What methods would work best for this role?



ACTION WORKSHEET

Step 5. Engagement

To expand your engagement of adults 50+, consider a wide range of multigenerational places, networks, portals and events, as suggested in the checklist below.

ENGAGEMENT OPTIONS CHECKLIST

PLACES

- Retirement communities and senior housing
- Neighborhood coffee or ice cream shops
- Barber shops, beauty parlors, nail salons, laundromats
- Gyms or fitness centers with 50+ programs
- Public libraries, community centers and organizations
- Faith organizations, interfaith centers
- Adult or community education programs (e.g. OLLI programs)
- Other: _____

NETWORKS OR GROUPS

- Your current donors and volunteers
- Grandparents of children you serve
- Retired professional associations (teachers, social workers, government workers, etc.)
- University alumni groups, including fraternity and sorority alums
- Social groups (book clubs, etc.)
- Neighborhood associations
- Service groups (Rotary, Lions, etc.)
- Culturally-specific organizations
- Virtual groups (e.g., on Facebook)
- Organizations serving homebound people if you're offering virtual opportunities
- Other: _____



ONLINE PORTALS

- VolunteerMatch.org
- CreatetheGood.org
- CommonGoodCareers.org
- WorkforGood.org
- PointsofLight.org/HandsOnNetwork
- Idealist.org
- Nonprofit-jobs.org
- RetirementJobs.org
- LinkedIn for Nonprofits
- Nextdoor.com
- Other: _____

EVENTS

- Farmers' markets or street fairs
- Health Fairs
- Volunteer or job fairs
- Fundraisers
- Social events at your office or delivery sites
- House parties
- Community meetings
- Other: _____



ACTION WORKSHEET

Step 6. Vetting and Selecting

Ask yourself these questions in thinking about how you vet and select adults 50+ for staff and volunteer roles. If you can't answer Yes, you may need to consider making changes.

VETTING & SELECTING CHECKLIST

INTAKE

- Does your website clearly state the sequence of steps in the application and review process? Is it available in print and in other languages for those who request it?
- Does it establish a timeframe for each step? Can you ensure the timeframes will be met?
- Do you have communication methods in place – phone, email, text – that match the needs and preferences of your candidates?

VETTING

- Are all background and other checks clearly listed, along with the timeframes, costs and actions required of the applicant for each one?
- Have you developed strategies for waiving or subsidizing background check costs for lower-income applicants?
- Have you defined and communicated who will interview the applicant and when?
- Will an adult 50+ be part of the vetting and interview process?
- Does your pre-service orientation give people a good sense of what working together in the program will look and feel like?



SELECTING

- Is it clear how the applicant's skills, qualifications and temperament will be assessed to determine whether there is a good fit?
- Who in the organization will make the final determination?
- How will the final acceptance or rejection be communicated to the applicant? Remember, adults 50+ may prefer personal communication (via phone call) to voicemail or email messages.

MATCHING

- If there is close alignment with some but not all requirements, how can the gaps be closed?
- Is there a match with the communities served in terms of language, cultural sensitivity, knowledge of the local community?
- Have team members, depending on role, had a chance to interact with the applicant?
- Have you considered how you might adapt or adjust roles to take full advantage of the talent that has come your way?

AGREEMENT

- Have you created clear expectations, ideally in writing, about work schedule, role requirements, salary and benefits (if any), HR policies, reporting/supervision structure, etc.?
- Is there a clear understanding among staff, volunteers, partners and others about this role and upcoming work, including an opportunity for any questions or concerns to be raised?



ACTION WORKSHEET

Step 7. Onboarding and Training

This checklist will help you adapt your training materials and sessions to the needs and preferences of adults 50+.

TRAINING CHECKLIST

PRE-TRAINING COMMUNICATION

- Adults 50+ know when and where training and onboarding events will be held.

MATERIALS

- Adults 50+ receive copies of materials and information they are expected to read before training begins.
- Materials (print and online) are printed in at least 12-point type and there is good contrast between type color and background color (lighter type is harder to read).

CONTENT DELIVERY AND FACILITATION

- Training is spread over several sessions rather than scheduled on a single day or weekend.
- Content relies on a mix of small-group discussions as well as direct instruction to allow content to be discussed as it relates to previous work and life experience.

- New adults 50+ are able to meet and connect with others they will interact with in their new roles (this might include effective use of video conferencing).
- The schedule allows for frequent short breaks – about every 90 minutes.
- Online training provides robust support/tutorials on how to use the technology that is relevant to the role.

ACCESSIBILITY

- The program and space are suited for participants with a range of physical ability and mobility issues, including those with low vision, hearing loss, or using mobility assists like a wheelchair.
- The training room is set up in a way that respects participants' need to move around, see one another, access restrooms and shift into discussion groups.
- Adequate amplification is provided for audio in large groups or big rooms.



ACTION WORKSHEET

Step 8. Integration and Support

Use this checklist to assess your capacity to integrate and provide meaningful support to adults 50+.

INTEGRATION & SUPPORT CHECKLIST

ESTABLISH RELATIONSHIPS

- Set up regular face-to-face meetings.
- Discuss personal goals for growth and learning.
- Discuss motivators, strengths and interests.

COLLABORATE ON A WORK PLAN

- Establish goals.
- Create a timeline.
- Agree on deliverables.
- Hold regular meetings to review progress.

PROVIDE OPPORTUNITIES FOR TRAINING AND DEVELOPMENT

- Offer in-service training opportunities.
- Provide opportunities to use existing skills in different roles.
- Provide opportunities for leadership.
- Remain open to ideas that team members bring for their own skill development.

SHARE THE IMPACT

- Share stories on your website, in social media and other outlets.
- Share impact in reports to staff and funders and at meetings/conferences.
- Mobilize adults 50+ as ambassadors.
- Ask for other ideas from your team.

CREATE FEEDBACK LOOPS

- Offer opportunities to give and receive feedback in an open, accepting forum.
- Create a continuous improvement plan, in the spirit of lifelong learning.



ACTION WORKSHEET

Step 9. Recognition and Community Building

Identify from this checklist the steps you will take to recognize, show appreciation for and build community among your volunteers and staff, particularly adults 50+.

RECOGNITION & COMMUNITY-BUILDING CHECKLIST

RECOGNIZE

- Say hello, see how they are doing and say THANK YOU!
- Put your thanks in writing with cards (or holiday cards, e.g., Grandparent's Day, Valentines).
- Put a card, Post-It, or small treat on their desk acknowledging the good work.
- Social media fans love shout outs on Facebook, Twitter, Instagram, websites.
- Invite local news coverage/media to cover special milestones/great work by staff/volunteers.
- Recognize highlights: years of service, volunteer hour attainment, special contributions.
- Tell a story about individuals' work at a team/staff meeting.
- Provide business cards and designated office/work space (especially nice for volunteers).
- Write a memo to your CEO or executive leaders about something great they did.
- Highlight individual profiles on web or in newsletters (interview them).
- Promote to new roles; increase wage/salary/stipend.

GIFT

- Provide T-shirts, lanyards, badges, etc. to identify with the organization.
- Provide gift cards to local restaurants, bars, book stores, etc.
- Provide tickets to concerts, plays, behind the scenes tours, etc.
- Provide reduced fees/discounted memberships to local gyms, yoga, or other services.
- Give items with your logo to use or show off, e.g., canvas bags, notebooks, mugs.



ENGAGE

- Provide access to courses and workshops at a local college or university.
- Invite to blog on the website or in a column in your newsletter.
- Invite to speak on a radio program or other outreach gig.
- Invite to present at local/national conferences.
- Engage as co-trainers for staff on topics that use their expertise.
- Train as community ambassadors/program recruiters.
- Provide relevant professional development opportunities.

CONNECT

- Encourage shared decision-making and collaborative problem-solving.
- Sponsor social events, like a picnic, happy hour, visit to a museum or a sporting event.
- Hold book discussions, musical recitals or an all-ages talent show.
- Organize intergenerational mentoring relationships to enable individuals to learn from one another and appreciate what each brings to the table.
- Encourage personal touches, remembering birthdays and other moments of significance.
- Ask your team members to think creatively about ways to stay connected.
- Host recognition parties/events to celebrate successes as a group.
- Create opportunities for adults 50+ to connect with other organizational staff and volunteers with whom they typically don't interact.



ACTION WORKSHEET

Step 10. Measurement and Evaluation

This checklist will help you identify the types of data, collection methods and approaches you might consider in designing, adapting or adding to impact measures, including elements specific to adults 50+.

MEASUREMENT AND EVALUATION CHECKLIST

TYPES OF DATA YOU MAY WANT TO COLLECT

- PROCESS EVALUATION.** What inputs, activities, materials, resources does it take to make the program happen? Are activities and programs being implemented the way you intended? (Sometimes called “Evaluation to Know”)
- OUTCOMES/IMPACT EVALUATION.** What are the changes you seek for the youth served? Adults 50+? Co-workers? The organization? The broader community? (Sometimes called “Evaluation to Show”)

THEMES YOU MAY WANT TO ASK ABOUT

- IMPACT ON YOUTH.** Do adults 50+ positively influence youth growth/success? How? What specific academic or behavioral outcomes improved? Do young people say they feel more supported?
- IMPACT ON ADULTS 50+.** Does the work benefit adults 50+? How? Do older adults report greater physical activity, feeling healthier, or more social connections?
- IMPACT ON/SATISFACTION OF CO-WORKERS.** Do co-workers see benefits from a more intergenerational team? What kind of benefits?
- INCREASE IN CAPACITY OR PROGRAM GROWTH BECAUSE OF ADULTS 50+.** Has there been an impact on the organization? What kind of impact?

INTAKE/ONBOARDING/EXIT DATA YOU ALREADY COLLECT

- Is there a way to adapt your current data collection to integrate themes around adults 50+? (e.g., If you don’t currently ask the age of your volunteers, you may want to add that data to examine the impact of volunteers 50+.)



DATA COLLECTION STRATEGIES AND TOOLS TO CONSIDER

- Intake and exit forms.
- Short individual interviews.
- Focus groups/group interviews.
- Questionnaires.
- Standardized measurement tools/scales (see generativity scale in the resources section).
- Stories.

WHO WILL DO THE WORK?

- Dedicated data/research individual or team.
- Third-party evaluation professional/firm.
- Graduate student or intern from university program that teaches a research methods class.
- Volunteer who has retired from an evaluation job.
- Liaison Role: Ask someone in your organization to serve as liaison to the research team so they are oriented to what you do and get their questions answered promptly.

DESIGN CONSIDERATION FOR ADULTS 50+

- 12-point font or better for all forms and measurement scales.
- Online or paper for all forms and measurement scales.
- In-person interviews and focus groups for data collection.
- Educational forums to help people orient to and increase comfort around evaluations and data collection.
- Advisory teams of adults 50+ to help design and inform evaluation plan.
- Use of skilled volunteers for data collection and analysis.

