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Baby Boomers, Public Service and Minority Communities:

A Case Study of the Jewish Community in the United States

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In concert with Civic Ventures



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Foreword

The dawning of the 21st century is remarkable in several respects. Not only do things happen faster, but in terms of the more extended and enduring life course, they are happening later. Baby Boomers live with the jarring consciousness that their great-grandparents may have survived only until their early 40s, while their own adult children may hardly have married or had children (if they ever will) by that age.

Boomers are the first generation in human history (with the possible exception of some biblical characters) to reasonably anticipate living well and wholesomely into their 80s and 90s, if not beyond. As bright as the prospects of longevity are for more Americans, those for Jews in particular are possibly even brighter. Not only because many can get free advice from “my son or daughter the doctor,” but also because Jews are the most highly educated and most affluent religio-ethnic group in America, with all the consequences this brings for better health habits and access to higher quality health care.

But not only are Jews (as others) living longer, they are living in an age of meaning-seeking, with the interest and wherewithal to make living a life of meaning an ultimate and reasonably obtainable objective for any point in their lives. As such, this aging yet largely healthy generation of American Jews poses a challenge (and opportunity) to a society and community that is as yet unprepared for the totally new policy and planning possibilities that loom in the near future.

This pioneering work by my friend and colleague Dr. David Elcott ushers in a new era of thinking about a new “problem”: How to provide for an extended life of meaning to healthier and wealthier Jews in North America—and by extension, to people of all backgrounds and walks of life.

*Professor Steven M. Cohen, Director
Berman Jewish Policy Archive at NYU Wagner*

The complex challenges we face as a society today—from global climate change to education reform and healthcare—require that we engage the talents of people at all levels of organizations, across diverse sectors of society and increasingly across the lifespan. These challenges call on us to enact leadership as a collective achievement.

At NYU Wagner’s Research Center for Leadership in Action, we are concerned with building knowledge and capacity for leadership that will transform society and strengthen our democracy. The research our faculty colleague, Dr. David Elcott, presents in this report offers critical insight into the motivations and potential contributions of one very important constituency in that effort, the Baby Boom generation.

As Boomers move toward what would traditionally be considered “retirement” age, social sector organizations of all kinds have an unprecedented opportunity to harness their talents, expertise and energy in service of leadership that advances communities and provides new solutions to intractable social issues. At the same time, with younger generations taking up leadership in new ways—with increased meaning, participation and flexibility—and Boomers staying engaged, new possibilities are emerging for restructuring leadership roles and fostering intergenerational collaboration and learning.

David’s specific focus on Jewish Baby Boomers has important implications for our broader understanding of the unique contributions diverse groups are making to work for the public good. Finally, his findings about what it will take for Jewish organizations to leverage Boomers’ talents hold practical insights for all nonprofit organizations as they seek to build leadership across the generations.

*Bethany Godsoe, Executive Director
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Executive Summary

By 2030, when Baby Boomers will be between 66 and 84 years old, they will still represent over 20 percent of the U.S. population, and in terms of the particular interest of this study, an even larger percentage of the Jewish population. They are healthier, wealthier, more mobile and more highly educated than any preceding generation. Whether or not they are anxious over the present economic downturn, the presumption remains that they will remain active and stay involved in society for many decades (Roof 1993, pg. 2). This has led to a shift in some of the research about the elderly, from traditional geriatric concerns (health, housing and psychological services) to issues such as full-time “Encore” or Bridge careers and volunteerism, job flexibility, life meaning, time management and mobility. Civic Ventures, an advocacy and research effort based in San Francisco, posits that the United States must begin promoting Encore or post-retirement careers in public service for Baby Boomers. In fact, many such efforts are afoot, encouraging civic engagement through public service that would press governments, nongovernmental organizations (NGOs) and other public service agencies to revamp the ways they look at things such as hiring, job retention and work schedules, while rethinking the lines separating paid professionals from volunteers.¹ This cohort could offer 30 years or more of active and creative involvement, revitalizing—in the particular focus of this study—Jewish culture, civic engagement, social services, political activism, intellectual life and artistic creativity, as well as the Jewish communal institutions that would support these efforts.

If this hypothesis about continued civic engagement bears fruit, minority ethnic, religious and national-origin communities could benefit from increased involvement in their communal institutions. Such increased involvement by Baby Boomers in the minority communities with which they identify could foster greater allegiance and fidelity as well as provide invaluable talent. But it is also possible that the larger and better funded national, secular efforts, akin to Teach For America or City Year, will provide similar opportunities for this cohort, thus drawing away this pool of Baby Boomers. This could deleteriously affect these minority communities, if as their members look outside for resources, supports and volunteer or paid professional opportunities, their allegiance to their community diminishes. For an ethnic, religious or national origin community to flourish, it may well need to learn everything it can about this new phase of life and strategize about how to maximize Baby Boomer involvement.

¹ On April 29, 2009, at a conference of researchers hosted by NYU's Robert F. Wagner Graduate School of Public Service, Greg O'Neil, director of the Public Policy Institute at the Gerontological Institute of America, presented a diagram of the dozens of efforts supporting Baby Boomer public service. He noted that the majority of organizations focusing on these topics were created within the last five years. The national organizations on aging, such as the American Society on Aging, National Council on Aging and the Gerontological Society of America, all have projects on civic engagement. The center circle of the chart reflects new social innovators/social sector organizations, and many of these organizations are geared toward the highly skilled, middle-aged set (e.g., former Peace Corps members looking to go back abroad to do higher-level work). He explained that the Edward M. Kennedy Serve America Act will change some of the income eligibility levels for grants to get older adults involved and the US Department of Labor's Senior Community Service Employment Program will provide immediate jobs as funding flows from the stimulus bill. Foundations such as the John Templeton Foundation, the Rose Community Foundation and Atlantic Philanthropies are putting significant funds toward Civic Ventures and other such Baby Boomer projects. There are now numerous articles in *The Chronicle of Philanthropy*, and the *Wall Street Journal's* “Encore” section, by Kelly Green, is one of most widely read. Private sector enterprises such as IBM have large retiree volunteer programs, and Civic Ventures has piloted a public service Encore career placement program for professionals from downsized companies. The Serve America Act's \$5-6 billion could be a stimulus for this network, and AmeriCorps' \$100+ million allocated for people over 50 could be a tipping point.

This research focuses on one such minority community, the Jewish community in the United States. By analyzing a national survey in 34 communities of Jewish Baby Boomers, comparing the results to a national survey by the MetLife Foundation and Civic Ventures in 2008 and utilizing the comments recorded in seven focus groups, this study addresses the impact of Baby Boomers and retirement/Encore careers on one minority community. The interest is to provide a baseline understanding of the retirement plans of Jewish Baby Boomers that can be extrapolated to offer data and analysis that could help minority communities sustain Baby Boomer allegiance. The research described in this paper lays out the tools for doing so, highlighting the types of efforts minority communities can use to engage Baby Boomers in public service and foster institutional changes that can then be replicated across the country.

Minority communities, even those as organized as the Jewish community, do not necessarily have the resources and research to influence effectively the discussion concerning Encore public service careers for Baby Boomers or provide the services Baby Boomers would require. Unlike major national efforts that are well funded and publicized, minority communities may find it difficult to marshal the resolve and effect the institutional changes necessary to create a public service Encore infrastructure. Yet without major retooling to capture Baby Boomer attention and allegiance, an open society in which minority members can seek meaning and professional or volunteer fulfillment in any setting they choose will prevail to the detriment of minority communities in the United States.

Major Findings

The most salient findings provided by this study include:

1. Wealthier and more educated Baby Boomers are not likely to seek retirement in the traditional sense at 65. In fact, nearly 80 percent are prepared to consider an Encore career in some form of public service.
2. Jews are potentially less likely than other educated and wealthy Americans to seek out an Encore career in public service.
3. Jewish Baby Boomers are concerned about earning income (although not simply for economic security), as well as staying active and involved as they grow older.
4. The two most emphatically perceived needs for those interested in an Encore career are (a) flexible time and (b) staying active, productive, challenged and intellectually engaged.
5. Jewish professionals expressed great concerns that the demands Baby Boomers (both volunteers and those seeking paid positions) will place on Jewish institutions are more than these institutions can handle. Jewish institutions are not prepared or preparing for an influx of Baby Boomers as volunteers or Encore career professionals.
6. Jewish Baby Boomers would prefer being helped by Jewish communal agencies in finding meaningful Encore activities and would also prefer to serve the wider American society through Jewish institutions, but they are also prepared to utilize non-Jewish resources if the services and opportunities they seek are not available in the Jewish community.
7. The majority of Jewish Baby Boomers do not at this time see either volunteer or paid Encore careers as a way to express their Jewish identity.

Baby Boomers, Minority Communities and Civic Engagement

The Jewish Encore Project is focused on the nexus of public service, the vitality of minority communities in the United States and Baby Boomers (defined as Americans born from 1946-1964). The project is grounded in the hypothesis that Baby Boomers, as they age over the next decade, will re-conceive a stage of life from about 60-80 years old, and as they do, force shifts in communal institutions currently ill-suited to this re-conceived vision. Three out of four Baby Boomers expect work to be a significant part of their lives well beyond traditional retirement age (Morrow-Howell & Friedman, 2006-07). A 2005 Merrill Lynch study asserts that 76 percent of Boomers intend to keep working and earning in retirement, “retiring” from their current job at age 64 and then launching into an entirely new career (Merrill Lynch, 2005). It is also important to note that these studies preceded the economic downturn that began in 2008.

The larger issue of civic engagement in the United States, of which this research is a part, has been debated for the last decade as researchers and policymakers try to judge the significance of a diminution of membership and leadership in many of the voluntary associations that historically populated America, with a number of studies voicing concern about the effects of this diminution on democracy in the United States (Putnam, 1996; Skocpol, 1999). In particular, Theda Skocpol has addressed the move from participatory performance in civic organizations to membership in entities that are professionally driven and administered and that lack any human, face-to-face interaction (2003).

There is counter-evidence as well. Baby Boomers display a somewhat higher rate of volunteer public service than the two prior generation cohorts during similar periods of their lives (ages 46-57), although it may be more episodic, of shorter duration and without the institutional affiliations of prior generations (Corporation for National and Community Service, 2007). The concern over diminished or reconfigured and episodic civic engagement is significant because such shifts may pose problems for minority communities that depend on voluntary associations to sustain their institutions, provide leadership and serve the needs of their communities.

As Michael Walzer (1997) reminds us, in speaking about minorities in the United States, “Though they are historical communities, they must function as if they are voluntary associations...any group that hopes to survive must commit itself to the same pattern of activity—winning support; raising money; [and] building schools, community centers and old age homes” (p.147).

If Baby Boomers are pulled away from their particular communities and toward more national mobilization efforts, the negative impact on minority communities could be even more severe (Walzer, 1997). In one focus group that was run as part of our study, a leading Jewish professional explained, “Baby Boomers look for value and meaning differently than their parents. They find meaning beyond the Jewish community, can go where they want, when they want. Those who can be involved seem to get more status outside the Jewish community. This change is serious” (New Jersey, Nov. 19, 2009).²

²See page 9 for a description of the focus groups.

This study, then, focuses on one aspect of the civic engagement conversation: the potential public service of Baby Boomers as they move toward traditional retirement age and the possible impact on minority communities, specifically the Jewish community in the United States. We will explore how Jewish Baby Boomers think about public service, compare their views with those of other Americans and consider what attracts and concerns these Jewish Baby Boomers when they think about retirement. We will also indicate what institutional tensions arise for Jewish communal organizations and the overall Jewish community in terms of using Jewish Baby Boomer Encore (paid and volunteer) careers as a way to fortify identity and allegiance.

The Jewish community may be unique among minority groups in terms of its demographics and degree of institutional organization. Jews in the United States, as will be clarified below, are relatively wealthier and more educated than the population at large. They have built sophisticated local and national organizational structures that have functioned for more than 100 years. Not all the findings of this study will have direct implications for other minority groups in America. Yet, if the core issue is the impact of Baby Boomer civic engagement and public service over the next decades and the vitality of minority communities, analysts and communal leaders should be able to apply many of the findings here to other minority communities, as well as expand a comparative framework for structuring future research.

This study, then, means to be part of a larger body of work looking at Baby Boomers in the work and volunteer force. Therefore, we begin with an examination of what we have learned from the field of Baby Boomer study.

What We Know about Baby Boomers, Encore Careers and Retirement

The idea that Baby Boomers will stay in the labor force beyond 65, but in different types of work, is foreshadowed by somewhat older Americans who have been tracked in national labor studies. As Giandrea et al. explain, “Older Americans are staying in the labor force longer than prior trends would have predicted and they often change jobs later in life. In fact, the majority of older Americans who have had career jobs make a transition prior to retirement” (3). “[B]etween 2003 and 2005, the number of older workers grew faster than any other age group” (3), making a strong case that America’s future labor force will include a significant percentage of Baby Boomer workers. It is also noteworthy that many of those workers have “the skills and experience needed in nonprofit organizations” (Casner-Lotto, 2007, p.8).

Joseph Quinn of Boston College, speaking at a research conference at NYU’s Robert F. Wagner Graduate School of Public Service in April 2009, posited that since 1985 both male and female labor force participation in the *55 to 59 and older* group stabilized and then actually rose. He estimated that 60 percent of older Americans, when leaving career jobs, do not leave the labor force but move into Bridge jobs that are different from their career work. He found a U-shaped curve that defines retirement for older Americans. At the upper and lower ends of wealth are majorities that plan to continue working in lieu of retirement at or before turning 65, while middle class white- and blue-collar workers tend to be the ones who retire from the work force as soon as they can. At the bottom end of the income scale, people continue to work out of need (for health insurance, income and other benefits that they cannot afford to lose). At the higher end, they continue working because they seek meaningful activity. Even after five years, half of those who left their career jobs remain in Bridge jobs. Bridge jobs tend to pay less and offer fewer medical or pension benefits but provide other benefits that

staying on in career jobs historically do not: job flexibility and greater meaning, which are deemed valuable by older workers. The jobs may look less appealing on paper but are probably not experienced that way by the people who have them. Rather, such work is more appropriate for them and where they are in life.³

In 2008, the MetLife Foundation and Civic Ventures (ML/CV) published their national *Encore Career Survey* on the interest of Baby Boomers in various forms of public service. They found that “a surprisingly large number of people between the ages of 44 and 70 years old are already doing work that combines income and meaning with social impact” and that forms of purposeful public service—in education, health care, government and other areas of the non-profit sector—could grow rapidly as Baby Boomers age (Peter D. Hart Research Associates, 2008a, p.8). While concerns have been voiced about this trend,⁴ the evidence indicates a movement toward meaningful and socially purposeful work in the latter third of life (Peter D. Hart Research Associates, 2008a).

Baby Boomers, Encore Careers and Retirement: The Jewish Context

There has been very little investment in serious research about how Jewish Baby Boomers imagine their future and what they want and need. As one focus group participant stated with dismay, “It makes me wonder why we have not been looking at this earlier. We always talk about young adults and never think about looking at Boomers” (San Francisco, Oct. 19, 2009).⁵ Where there have been attempts to examine Baby Boomers in the Jewish community, the focus jumps to seeking ways to better engage Jews as funders and volunteers in the Jewish community before eliciting even basic information about their interests and intentions.

A very limited number of institutional and local studies have begun to explore the needs and anticipate the plans of Jewish Baby Boomers with a focus on future social service geriatric needs and volunteer opportunities. One innovative project, for example, at the re-constructivist rabbinical college Hiddur, the Center for Aging focuses on spiritual geriatric matters. Almost none has addressed the potential of seeking Jewish Baby Boomers for some form of Encore career in Jewish public service.⁶ The most extensive analysis has been provided by the Association of Jewish Family and Children’s Agencies (AJFCA), a national network of Jewish social service institutions. Noting the literature on Baby Boomers, they have described

³ Joseph Quinn from Boston College presented on April 29, 2009, at a research conference on Encore careers convened by NYU Wagner’s Research Center for Leadership in Action and Civic Ventures.

⁴ The concern is that promoting an active, vibrant older population working and volunteering for the betterment of society “has become a panacea for the political woes of the declining welfare state and its management of so-called risky populations.” (See Steven Katz. “Busy Bodies: Activity, Aging, and the Management of Everyday Life” *Journal of Aging Studies*. 14. 2. (2000): 147 as cited in *Public Policy and Aging Report* 16. 4. (Fall 2006): 24.) As Martha Holstein notes: “At the very least, we need to pause and ask whether universal images of aging...appear upon closer inspection to be very specifically class, race and gender-based. Recognizing difference leads us to see that neither universal images of aging nor ‘neutral’ public policies are neutral or innocent in their effects. Thus, to the extent that ‘civic engagement’ is emerging as a new master narrative, it is important to ask: what does this narrative assume, whom does it privilege and whom does it exclude, and to what extent—socially, politically, culturally, morally and personally?” (See Martha Holstein. “A Critical Reflection on Civic Engagement,” *Public Policy and Aging Report*. 16. 4 (Fall 2006): 21.)

⁵ As an example, in a recent study by Cohen and Berkowitz of almost 200 Jewish foundations and philanthropists, those surveyed were asked to specify the focus of their philanthropy. Of the 21 categories listed, the only reference to a specific age cohort older than young adults was “social services for the elderly.” (See Steven M. Cohen and Dasee Berkowitz, *Patterns of Singularity: The Motivations of Jewish Funders in Times of Economic Distress*. The Andrea and Charles Bronfman Foundation and the Charles H. Revson Foundation (March 2009): 15. <http://www.acbp.net/About/PDF/Patterns%20of%20Singularity.pdf>)

⁶ One intriguing example can be found on a YouTube Web site marketing a new Encore public service program for American Jews in Israel. (See www.youtube.com/watch?v=VapeShHEPt4.)

a variety of volunteer programs offered by local Jewish family service institutions. They have asserted that the highly skilled Baby Boomer retirees must be offered volunteer opportunities that are interesting, meaningful, flexible and episodic rather than long term. The AJFCA study did locate a few model programs that provide volunteers with some form of remuneration and/or benefits (Association of Jewish Family & Children's Agencies, 2009). No models address bringing Baby Boomers into Bridge or Encore careers in the Jewish community nor are there recruitment and training programs specifically aimed at Baby Boomers.

The *Metro Denver/Boulder Jewish Community Study* noted that 44 percent of all households in the seven counties studied are Boomer households, split almost evenly between younger (45- to 54-year-old) and older (55- to 64-year-old) Boomers. Sixty-three percent of the younger Boomers and 52 percent of older Boomers volunteered, whether for Jewish or other organizations. This study did not provide data on professional public service activity (Ukeles Associates, 2008). A Cincinnati study of Baby Boomers confirmed the themes that concern Jewish communal leaders: while Jewish experience permeates their lives and there is great interest in seeking life's meaning, they are not motivated to engage in traditional communal structures (Ukeles & Miller, 2008). United Jewish Communities, a national umbrella organization (now known as the Jewish Federations of North America), convened a short-lived program "...to promote creative thinking and identify new approaches to engaging Baby Boomers in service to the Jewish community" that included a February 2007 meeting that did not lead to further investigation.⁷ This noticeable lack of hard data about who Baby Boomer Jews are and what they are planning helps to make this Jewish Encore research project with its national survey more urgent and valuable.

⁷The description of this project was submitted as a report to the United Jewish Communities (now the Jewish Federation of North America) by the Domestic Affairs Pillar in January 2007.

The Jewish Encore 2009 Survey

Methodology and Comparative Demographics

With these issues in mind, we launched, in cooperation with NYU Wagner's Research Center for Leadership in Action and Berman Jewish Policy Archive, a national survey of 34 communities focused on a specific minority population as a comparison study.⁸ Responses came in during the financial downturn of July 2009 (though, as explained later, we do not think the recession had a significant impact on the ways respondents answered the survey). We surveyed a segment of the Jewish community identified through their Jewish affiliation. We replicated questions from the Met Life/Civic Ventures national survey to see how this minority group compares to the national population and then developed survey questions that could elicit information about the relationship of public service and civic engagement to the particular ethno-religious commitments of the respondents.

Among the national and even local surveys that focus on Baby Boomers, the paucity of data on religious affiliation and its relationship to Baby Boomer plans is apparent. In spite of the rise in faith-based initiatives funded by the U.S. government and the significance of religion as a key factor in electoral politics and policy decision-making, the role that religious institutions can and do play in the volunteer and professional choices Baby Boomers are making—and will make in the future—has been ignored. Given that repeated surveys show that Baby Boomers seek work and volunteer opportunities that give them a sense of meaning and purpose, one would have assumed that churches and mosques, synagogues and temples would have been an obvious target of research.⁹ In general, however, the recruitment, mobilizing and training roles of religious and ethnic institutions have not been adequately researched and analyzed. The survey employed in this study of the Jewish community, then, not only illuminates the needs of a specific religious community but offers a model for further research directed at other faith communities and ethnic groups.

The Jewish community in the United States is unique in its demographic characteristics: urban, highly educated, wealthier than any other religious and/or ethnic group, and institutionally identified (Pergola, Rebhun & Tolts, 2005). The survey that underpins this research study utilized e-mail addresses supplied by local Jewish Federations (the umbrella organizations of most Jewish communities) in 34 metropolitan areas (see Appendix 2). As a result, our respondents are more affiliated, and on the whole, more educated and wealthier even than the Jewish community at large. Such a core affiliated population may well be the initial target of local communities and institutions seeking to understand better the needs and aspirations of Jewish Baby Boomers and begin to consider what steps could be taken to sustain or even increase Jewish identity, public service and civic engagement. Looking at those already affiliated provides insight into those most likely (by virtue of past performance) to continue their engagement in forms of public service.

Some Federations were able to isolate Baby Boomers, while other communities sent the survey to their entire lists. Only in the case of the New York survey, where there was no Federation access, did we e-mail directly to members of synagogues, Jewish community centers and Jewish

⁸ See Appendix II for list of communities and the number of responses from each.

⁹ In a review of the surveys and research reports of Civic Ventures, AARP, ReServe, and those of institutions participating in either the NYU Wagner discussion on April 29, 2009, or the follow-up on November 1, 2009, none included religious affiliation as a variable to be considered.

social service agencies. As a result, using email blasts sent by the local communities and our own, we received responses from 12,139 individuals, of whom just over 67 percent were Boomers born between 1946 and 1964. Approximately half of the Baby Boomers voiced an interest in Encore careers, so that there were about 4,500 responses specific to questions about a paid Encore career. Approximately 600 respondents were interested solely in volunteer Encore careers and responded only to questions about volunteer service.

To test how representative the survey group is of the overall Jewish population, we ran a comparison with the data compiled in the *2000 National Jewish Population Study* (see Appendices 3.1-6, which include some demographic comparisons with the ML/CV survey as well). Looking at certain key variables, the 2000 NJPS and the 2009 Jewish Encore populations share quite similar marriage rates, religious affiliation, synagogue and Jewish institutional membership, adult Jewish learning and income levels. Respondents to the *Jewish Encore Survey* obtained higher educational degrees than the general Jewish Baby Boomer population and contributed to Jewish causes at a higher rate. They match Joseph Quinn's description of Baby Boomers at the high end on the U-curve. There were more female respondents (58 percent) than male (42 percent), which reflects the general trend in the U.S. that more women than men sustain religious affiliation (Bruce, 2003). Overall, if we seek to learn about Jews who are more likely than others to connect public service and civic engagement to their Jewish communal identity, then the respondents to the *Jewish Encore Survey* are a close approximation of a similar population in the 2000 NJPS sampling.¹⁰

As noted above, the survey itself paralleled the 2008 ML/CV national survey, utilizing the exact same wording where possible to allow for a comparison of the national population to this particular Jewish population (Peter D. Hart Research Associates, 2008a).¹¹ In addition, the *Jewish Encore Survey* looked at the volunteer interests of this population and of course tested issues of affiliation with and allegiance to the Jewish community.

Our analysis of the raw data of the ML/CV survey allowed us to look not only at the general population surveyed but to isolate those individuals whose education levels paralleled those in our Jewish Baby Boomer survey. So while we can compare the Jewish population of our study to the general population, we also can see how our Jewish population compares on key issues with others from the ML/CV national survey with the same socio-economic characteristics. In fact, as we will see, the Jewish population in this survey, while similar to that larger highly educated American demographic in many ways, also shows markedly different responses on a number of key questions.

Focus Group Discussions

In addition to the survey, we ran seven focus group discussions in different regions of the country: San Francisco; East Bay counties in California; Palm Beach County in Florida; Greater Miami; Los Angeles; Northern New Jersey (Bergen, Passaic and Hudson counties) and New York City.¹² The number of participants ranged from eight to 18, and the sessions

¹⁰ Analysis of the *2000 National Jewish Population Study* isolating Baby Boomers has been provided by Laurence Kotler-Berkowitz, director of Research and Analysis at the United Jewish Communities (now the Jewish Federation of North America).

¹¹ This survey was conducted by Peter D. Hart Research Associates between February and April 2008, involving 1,063 telephone interviews and 2,522 online respondents. Our analysis benefited from the collaborative efforts of their research team that provided us with the data to make comparisons. http://www.civicventures.org/publications/surveys/Encore_career_survey/Encore_Survey.pdf.

¹² Focus group participant responses are noted by city or state and date in parentheses throughout the text.

lasted approximately one-and-a-half hours. The majority of participants were Jewish communal professionals from social service agencies, Jewish Federations that serve as umbrella fundraising and convening agencies, Jewish community centers, synagogues and Jewish educational institutions. In most cases, we met with senior executives, human resource directors, volunteer coordinators and other professionals who deal with service delivery and personnel management. Lay volunteer participants were often involved in more than one organization or institution, and most had served in a variety of volunteer leadership positions. A number of the professionals were themselves in Jewish Encore careers, having moved from outside the Jewish community or from volunteer positions to take on significant professional roles in Jewish institutions. Almost all the participants were Baby Boomers, a reflection of who was invited by the Federation conveners and the reality that this is a topic that touches on personal concerns.

Focus group participants were asked to speak from their professional vantage point (for those who worked in the Jewish community), from their knowledge of the Jewish community and as Baby Boomers. Six questions were posed to all the groups, although the conversations often moved in other directions according to the insights and discussions of the participants. The six questions were:

1. Does your experience working in the Jewish community as a professional or lay leader confirm the findings of national surveys concerning Baby Boomer retirement plans? If not, how do you see the future of Baby Boomers as they move through their 60s and 70s?
2. What are the challenges to your organization in terms of changing the current structure and deployment of volunteers in light of what we know about Baby Boomers? How could you imagine changing things?
3. How open is your agency, synagogue or organization to reconsidering the traditional boundaries between professional and volunteer—think about part-time positions, stipends, bonuses, benefits, free or reduced membership and other incentives?
4. Should Jewish agencies, synagogues and organizations—or the community as a whole—consider developing a Boomer leadership corps to enhance operations and programs beyond traditional governance activities?
5. Could you imagine new institutions, programs or projects that could provide public service or civic engagement Encore opportunities for Baby Boomers to serve within the Jewish community or represent the Jewish community in service to the wider world? What would they look like?
6. What language do you think should be used to attract, retain and nurture Boomers and what new titles or terms could be used?

Baby Boomers at Work

What Makes Jewish Baby Boomers Different from the National Population?

Jewish Baby Boomers in this survey reflect a strong commitment to their professional lives and are more likely to be partners in or own their own businesses than are other American Baby Boomers. As seen in Table 1, just over ninety percent have some form of paid employment, with another 8 percent working as volunteers, a figure only slightly higher than the advanced education respondents to the ML/CV survey in both employment and volunteer involvement. The character of the professional picture, however, is different. While a similar proportion in both surveys are salaried employees, 22 percent of the *Jewish Encore Survey* are self-employed, a rate almost double that of the ML/CV respondents.

The effects of the 2009 recession were not evident at the time of the survey in this population, with less than 1 percent of the Jewish Encore Baby Boomer respondents unemployed and looking for work. Of the 679 respondents who are not working, 23 percent are retired, 19 percent are homemakers and 7 percent are disabled.

Table 1: Baby Boomers’ descriptions of their paid or volunteer activity*

	Civic Ventures		Jewish Encore
	Advanced Education	General	
Yes, working for pay	73	70	68
Yes, working as a volunteer without pay	3	4	8
Yes, working for other compensation	1	1	1
Yes, self-employed	12	11	22
Other	11	14	1

* Note: All table results shown are percentages unless otherwise stated. (Because percentages are rounded, they may not total 100%).

As seen in Table 2, 51 percent of Jewish Baby Boomers who are working are in a for-profit business (a figure somewhat higher than found in ML/CV Baby Boomers), while over 44 percent are already in some form of public service (NGOs, education and social service or government), a public service rate somewhat lower than found in the MetLife/Civic Ventures survey. A significant portion of those in public service were, given the Jewish affiliated pool of respondents, professionally linked in some fashion to the Jewish community. We do not know what percentage of those questioned in the ML/CV survey work in faith-based settings, since as we have noted, religion was not a variable considered in their study.

Table 2: Baby Boomers’ current employment

	Civic Ventures		Jewish Encore
	Advanced Education	General	
For-profit business	46	46	51
Jewish organization	N/A	N/A	20
Other nonprofit organization	42	40	16
Government agency	11	9	8
Not sure, or not sure about mission	1	5	5

Work as a Priority that Provides Personal Meaning

We see a picture of Jewish Baby Boomers as deeply committed to their professional lives, with work being a clear priority. Most continue to work at least 40 hours a week (over 60 percent) and have held their present jobs for years (half for more than 11 years and a quarter for between 5-10 years). In our survey, three out of four Jewish Baby Boomers (more than 76 percent) claim “tremendous” or “quite a bit” of satisfaction from their work. And as Table 3 indicates, more than 80 percent claim that, compared to other aspects of their lives (family, friendships, leisure activities and spiritual pursuits), a “great deal” or “quite a bit” of emphasis is put on their jobs.

Table 3: The amount of emphasis Jewish Baby Boomers place on their work

	Total Response
A great deal of emphasis	34
Quite a bit of emphasis	47
Just some emphasis	16
Not very much emphasis	3

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How Baby Boomers View Retirement and Encore Careers

Like their counterparts, Jewish Baby Boomers plan to continue working in the immediate future, although the front and back waves of this generation differ significantly from each other. While the largest percentage of Jewish Baby Boomers in the 57-62 age category plan to work in their jobs past age 65, half of the younger cohort intend to leave their present professions and will be seeking alternative plans for their lives. Overall, a considerable number of respondents plan to retire from their present work before age 65 or are unsure about how much longer they plan to continue working in their present employment (see Table 4). This is a large population open to change.

Table 4: Length of time before Jewish Baby Boomers plan to retire

	Jewish Baby Boomers by Age		
	44 to 50	51 to 56	57 to 62
A year or less	8	5	5
2 to 4 years	12	11	12
5 to 10 years	19	32	42
More than 10 years	45	37	17
Not sure	15	14	15

Does Retirement Mean Taking Life Easy or Starting a New Chapter?

The concept of an Encore career challenges the traditional chronology of full-time work followed by full-time retirement. Respondents were asked to think about what retirement means to them. This may mean taking life easy, enjoying oneself and taking a rest from work and daily responsibilities, on the one hand, or beginning a new chapter in life by being active and involved, starting new activities and setting new goals, on the other.

Of Jewish respondents, 7 percent saw it as a time to “take it easy” while almost 29 percent chose to begin a new chapter. However, 61 percent claims that it depends on the specifics, seeking a balance in which both are important. These responses stand in stark contrast to the ML/CV respondents, for whom 32 percent see retirement as a time to take it easy and 58 percent want to begin a new chapter. Only 8 percent said that it depends, imagining some of both.

Here we see the reasoning of both Quinn and Civic Ventures joined in the responses of Jewish Baby Boomers. Those who feel most financially secure (even if they voice some concerns over their long-term financial health) and who have completed college or advanced degrees are prepared to imagine an active and meaningful new chapter in their lives that will

include the flexibility to take life easier. There may be another point to note: that highly educated, wealthy Jewish Baby Boomers may differ from other minority Baby Boomers in terms of the freedom to choose. These themes will replay throughout the study.

Jews Are Much More Ambivalent than Other Americans about Pursuing an Encore Career

This possibility of seeking new, meaningful work becomes apparent in looking at Table 5. A significant percentage of Baby Boomers of all backgrounds (both from the ML/CV survey and the *Jewish Encore Survey*) plan to continue working full- or part-time after retiring from their current work. But unlike those in the ML/CV survey (where 50 to 58 percent are determined to stop working for pay), Table 5 indicates that only 19 percent of the *Jewish Encore Survey* respondents are committed to ceasing work for pay in their retirement.

As one focus group respondent explained, “Wealth matters for Jewish Baby Boomers who feel that they are a safety net for their children.” Almost 80 percent of the respondents in the *Jewish Encore Survey* will be looking to continue what they are doing or will be looking for some form of a meaningful Encore career in their 60s and 70s.

Almost 80 percent of the respondents in the Jewish Encore Survey may be looking to continue what they are doing or will be looking for some form of a meaningful Encore career in their 60s and 70s.

Table 5: Baby Boomers’ interest in an Encore career

	Civic Ventures		Jewish Encore
	Advanced Education	General	
Yes, plan to work full time	4	3	8
Yes, plan to work less than full time	33	28	19
Yes, plan to work—not sure whether full or part time	10	9	19
No, do not plan to work for pay	50	58	19
Not sure/no answer	3	2	35

In trying to understand why a third of the respondents were indecisive about their plans, we asked some of the follow-up focus groups to explain the glaring difference between Jewish respondents and those of the national survey. Certainly there is some economic anxiety around whether there will be enough to live on and take care of the children and grandchildren when life spans are rapidly increasing. Baby Boomers may have spoken with financial planners and insurance agents, but Boomers seem not to have focused on growing old, and there are few settings in which such conversations take place. No one in any focus group—neither Baby Boomers nor those in Jewish policymaking, social service and counseling agencies—could provide examples of Jewish forums tasked with imagining a Baby Boomer future. Because retirement at age 65 has been the accepted norm, with whole industries catering to retirement as the only lifestyle choice, and because youth has been the core narrative of Baby Boomers, what to do next simply has been unaddressed. But why Jewish Baby Boomers are more unwilling to choose one path or another may be culturally specific, perhaps a reflection of a tradition of leaving questions unanswered.

Baby Boomers Are Unsure about Investing in Encore Careers with a Social Purpose

We then introduced the notion of public service Encore careers and isolated those who expressed some interest in an Encore career that would utilize their experience and skills to help people in their communities or the broader world. This question expressly focused on some form of paid position rather than volunteer work. It noted that people have different ideas about what to do after they finish their midlife work. One path, the question stated, is to “continue working but in different work that lets them use their experience and skills to help people in their communities or the broader world.” We provided examples such as working for a nonprofit organization or government or in teaching or health care. We noted that the reasons could be financial gain, giving back to society or both.

Responses to this question—those who gave a rating of eight or more out of ten—were much higher for the general population than for the Jewish Baby Boomers in the survey. Negative responses, indicating no interest in such careers, were almost double among Jewish Baby Boomers, while a similar percentage in both groups felt that this sounded like what they are already doing. Such a strong negative (0 to

Because retirement at age 65 has been the accepted norm, with whole industries catering to retirement as the only lifestyle choice, and because youth has been the core narrative of Baby Boomers, what to do next simply has been unaddressed. But why Jewish Baby Boomers are more unwilling to choose one path or another may be culturally specific, perhaps a reflection of a tradition of leaving questions unanswered.

4 on the 10-point scale) and weak on the most positive side for these affiliated Jewish respondents was unexpected. And compared to other Americans, Jews are no more likely to give volunteer time. Understanding these responses will take further investigation. This said, over 80 percent did indicate varying degrees of interest in considering a public service Encore career or are already in such a career (see Table 6). They became the focus of the rest of the study.

Table 6: Baby Boomers’ interest in a public service Encore career

	Civic Ventures		Jewish Encore
	Advanced Education	General	
11, sounds like what I am doing now	15	14	13
10, very likely to consider	23	22	14
8 to 9	27	26	24
5 to 7	26	27	30
0 to 4, no interest at all	9	11	19

Baby Boomers Want to Maintain Benefits and Income, but More Essential Are Flexibility and Opportunities to Stay Productive and Challenged

The survey then probed the motivations of those interested in an Encore career. As we can see in Table 7, about a quarter of the respondents expressed interest in each of a variety of areas—pursuing a new challenge, being involved with people, helping others to make a difference in some way and doing something that they would enjoy. These responses are in some cases significantly at variance not only with the general ML/CV survey, but even with those

Table 7: Baby Boomers’ reasons to consider working past traditional retirement age

	Civic Ventures		Jewish Encore
	Advanced Education	General	
I expect to need the income or to maintain benefits	52	45	55
I want to pursue a new challenge	9	15	23
I want to stay active and productive	57	60	53
I want to stay involved with other people	30	29	28
I want to help others or make a difference	17	28	26
I want to do something I would enjoy	14	50	28

in the same educational bracket. “I want to do something I would enjoy” rates much lower for the Jewish cohort, and alternative choices remain noticeably lower in most of the categories except for “pursuing a new challenge.”

The two reasons given by more than half the respondents interested in an Encore career in both surveys were a need to maintain benefits and some income and the desire to stay creative, active and productive. Focus group responses noted how these two objectives connect: “Empty nesters are the ones rethinking their roles—satisfying creative urges in their work rather than being the CEO” (New York, Jan. 28, 2010). Any approach to aging Baby Boomers will need to take into account financial concerns and discovering meaning and purpose in life.

But financial concerns are trumped by a more prominent need for flexibility. When probing Jewish Baby Boomers who would seek a paid Encore career position, the responses in some ways serve as a contrast to the earlier focus on income as a motivating factor. As noted in Table 8, while a minority gave great importance to their desire to receive an income, or even

“Empty nesters are the ones rethinking their roles—satisfying creative urges in their work rather than being the CEO.”

—New York Focus Group Respondent

Table 8: Baby Boomers’ reasons to change employment for a Bridge or Encore career, by age

	Civic Ventures	Jewish Baby Boomers by Age		
		44 to 50	51 to 56	57 to 62
I need the income	39	46	44	41
I need the benefits	43	48	48	42
I want to be around other people	45	47	47	45
I want to work as part of an organization with a clear and important social purpose	38	41	43	40
I want to improve my community or society	40	41	44	39
I want work to allow me to take time off	70	59	63	63
I want to say active, productive and challenged	76	71	75	73
I want to be able to use my skills and experience	64	59	62	61
I want to have greater meaning in my life	51	56	58	53
I want to help other Jews	N/A	34	34	33
I want to find work that I could do from home	24	11	11	11
An Encore career is one way to live out my Jewish life	N/A	14	13	14
I want to work for part of the year	44	26	28	21

more so, benefits, these numbers were dwarfed by two very powerful perceived needs. One need is ensuring flexible time, a reflection of “taking life easy” (deemed very important by over 60 percent). The second need clusters around seeking sources of meaning, as indicated in a desire to stay active, productive and challenged (over 70 percent) while using skills and experience gained to help others (over 60 percent). In fact, when looking at the top categories (“very” or “somewhat important”), these dual concerns occupy well over 90 percent of those who are considering Encore careers. As one focus group participant said, “I see people who move to lower-level jobs even in the same field. Someone who wants to live in St. Augustine will work at a lower level just to get benefits like flexibility” (New York, Jan. 28, 2010).

In particular, the need for flexibility has been confirmed by studies independent of our surveys. In writing about the longitudinal national *Health and Retirement Study*, Giandrea et al. (2008) noted that an unusually high percentage of older Americans are transitioning from salaried jobs into self-employment. They showed that the key advantage of the move to self-employment is control over one’s job, of which flexibility in work schedule is a classic example.

Jewish Baby Boomers Seeking Meaning May Not Look to the Jewish Community

There is a concern for a minority community such as the Jewish community embedded in these data. While 90 percent of these respondents affirm a significant degree of importance to finding greater meaning in their lives and feeling a sense of accomplishment, this goal does not immediately connect to their Jewish identity. Only a limited minority saw an Encore public service career as one way to live out their Jewish lives or express their Jewish identity. While three-quarters of the Jewish respondents claimed that they want to help other Jews, that objective was viewed as very important only to a third of those who were thinking about what they would do for an Encore career. This was confirmed anecdotally in the focus groups. Whenever a focus group respondent noted that until reading about this survey and engaging in this discussion the idea of using skills and experience as an Encore career in the Jewish community had not crossed her or his mind, many others concurred.

“I am the person you are worried about. I am highly educated and pretty demanding. I feel less connected at this point in my life. Being involved in the Jewish community is not at the top of my list. I am no longer a member of a synagogue or of the JCC. I am not really interested in volunteering in a Jewish organization. My experiences in the Jewish community have not been fabulous. I will look elsewhere.”

—New York Focus
Group Respondent

One highly respected woman participating in a focus group expressed this view powerfully:

I am the person you are worried about. I am highly educated and pretty demanding. I feel less connected at this point in my life. Being involved in the Jewish community is not at the top of my list. I am no longer a member of a synagogue or of the JCC. I am not really interested in volunteering in a Jewish organization. My experiences in the Jewish community have not been fabulous. I will look elsewhere” (New York, Jan. 28, 2010).

As we will hone in on below, connecting a public service career to the Jewish community is not a natural response for most Jews in this survey. And it is worth repeating here that those participating in this survey are the wealthier, more educated and affiliated Jews in the United States. A final note by one focus group participant captured the pressure on any minority community competing with the national resources that are being expended on recruiting Baby Boomers: “If we want to get Jewish Baby Boomers to be involved in the Jewish community, we need to help them think about why this is important and find what they can do in the Jewish community” (San Francisco, Oct. 29, 2009). The consensus within the focus groups was that the link between life meaning and working in the Jewish community has not been achieved for most Jewish Baby Boomers.

Volunteers

All Volunteers Are Not the Same

As we have noted, not all Baby Boomers see the choice as between retirement and paid Encore careers. While volunteerism was not part of the ML/CV survey, we are interested in an expanded view of how Jews express their civic engagement. As Michael Walzer noted, minority communities fit within the voluntary association character of American civic life without the benefit of direct government funding for their institutions (even if there is some government support of programs that are open to everyone). Without official status, the Jewish community, as is the case for most minority communities, exists in its institutional form as a purely voluntary association—no one can force you to join a minority community. Volunteers play a significant role in every minority community in America.

Although many national public service volunteer programs try to offer some benefits and/or stipends to their volunteers, Jewish respondents seeking public service volunteer positions had little interest in material benefits such as health insurance, drug coverage or retirement funds (24 percent). When we looked at those who are already pursuing an Encore volunteer career as well as those who would consider volunteering as their expression of public service after retiring from their present job, we noticed that they did have a specific concern. Like those seeking a paid Encore career, this cohort wanted flexibility while remaining productive and using their skills to do good.

Unlike those who seek Encore employment, however, those focused on volunteering felt that working as part of an organization with a clear and important social purpose was important (90 percent). No doubt, if one is choosing an organization as a volunteer without pay and benefits, a shared sense of the values and goals of the organization will play a much larger role in determining whether or not to volunteer.

In addition, less than 20 percent of the respondents in this group saw their volunteerism as an expression of their Jewish identity, although 86 percent wanted their work to help the Jewish community. As one Jewish communal professional confessed, “Even those of us who work in the Jewish community may want to work outside” for an Encore career (Los Angeles, Nov. 25, 2009). This challenge looms large. If Baby Boomers are to establish relationships with Jewish institutions, presenting those institutions in effective and compelling ways that also enhance Jewish identity will be a critical feature of volunteer recruitment.

Volunteerism Is Not the Main Focus for Baby Boomers

Volunteerism as a form of Encore career is not the focus of most of those in the survey. Approximately 15 percent of the respondents definitely imagined themselves volunteering as an Encore career, while 42 percent expected some form of remuneration. Yet a larger percentage (43 percent) were unsure what route they would take, including the possibility that they would do neither (see Table 9). Even without taking into account the economic downturn, Jewish Baby Boomers seem unsettled as they anticipate the future. Once again, this Jewish cohort is at odds with the larger national population. At the same time, there is a significant pool of potential volunteers and job-seeking professionals who can imagine an Encore career of public service.

Table 9: Jewish Baby Boomers’ interest in an Encore volunteer or paid career, by age

	Jewish Baby Boomers by Age			Total Response
	44 to 50	51 to 56	57 to 62	
Volunteer	12	14	17	15
For pay	40	41	42	42
Unsure	48	45	41	43

The Perceived Value of Work for Pay: Volunteering Is Often Seen as Value-less

Given the relative wealth of the Jewish cohort, finances were not the issue of greatest concern, even during the severe recession in 2009. Yet, the desire that a majority of respondents voiced to be paid for their work, even in public service activities, begs exploration. We posed the question of tensions between paid professionals and volunteers in the Jewish community to our focus groups. Participants shared the perception that highly trained professionals are sensitive to a commonly held belief that unpaid work is not valued, that it is “worth less,” succinctly expressed as, “Volunteer’ is now a pejorative term” (Palm Beach County, Oct. 26, 2009).

This sentiment was expressed both by Jews who are presently volunteer leaders in their institutions and those who are professionals working in the Jewish community. And this was affirmed in all the focus groups as a major challenge. Most of the communities and their institutions constantly seek ways to honor their volunteers. Yet there is a growing awareness that the ways volunteers are honored may be less effective than in the past. Only one volunteer leader in the focus groups claimed that she is quite happy to remain an unpaid volunteer since that allows her to not be involved when other obligations intervene (New Jersey, Nov. 19, 2009). Otherwise, focus group participants found the issue of promoting volunteerism increasingly difficult, even as they also found the idea of establishing paid Encore positions a challenge for their institutions.

There is research on volunteerism to confirm our findings. In their study of volunteer engagement, Fixler and Eichberg (2008) state, “We have learned over the last ten years that what worked before does not work now; the old model of volunteer management does not jibe with what Boomers want as volunteers” (p.11).

The tension over volunteers versus paid Encore professionals is already in play for a Jewish community historically dependent on volunteers. If the trend we describe

“I do not want to organize funder cards or stuff envelopes. It may be very important, but not for me.”

—New York Focus Group Respondent

The Four Greatest Concerns about the Future of Baby Boomer Volunteers

In the case of volunteers who do not expect salaries and benefits, all of the focus groups still voiced great concern over the capacities of Jewish institutions, especially social service agencies such as Jewish Family Service, to provide the types of meaningful volunteer opportunities increasingly desired by Jewish Baby Boomers. Their concerns, as a continuous thread connecting all the focus groups, can be clustered as follows:

1. Most positions need skilled, trained and insured professionals. Allowing volunteers to take on roles once designated for professionals opens agencies to liabilities against which they are not protected.
2. Jewish institutions and agencies, while overloaded due to budget cuts and increased demands and therefore in need of more personnel, do not have the staff time to recruit, train and supervise volunteers. As a number of focus groups noted, this is a hidden cost of using volunteers, and in the view of many, Baby Boomers have greater expectations for fulfillment and will place even greater demands on an overstretched system. As one communal professional said, “They (i.e., Baby Boomers) are a selfish generation, a ‘me’ generation. Their search for spirituality is self-focused” (Palm Beach, Oct. 26, 2009). True or not, this perception was shared by many.
3. With well-trained and educated volunteers entering a Jewish agency, the lines between professional and volunteer would become blurred. In many cases, the volunteer will have greater training and better education than case workers or other professionals. Concerns were voiced, again mainly by the Jewish communal professionals, over hostility and jealousy. An additional concern would be pressure from unions that do not want volunteers taking positions away from union-dues-paying professionals (most of the social service agencies are unionized).
4. The very needs that Baby Boomers have for flexible work hours and time off for family demands and travel would mean episodic and unreliable volunteering that would prevent agencies from being able to create meaningful and important positions for volunteers or to rely on them to provide continuous service. While volunteers need time off, the agencies need consistency and reliability.

toward more Bridge and Encore careers in public sector organizations is correct, then there will need to be major shifts in their funding and/or expected products. “I do not want to organize funder cards or stuff envelopes. It may be very important, but not for me” (New York, Jan. 28, 2009) was restated in different ways in each focus group.

Even Volunteers Will Become More Expensive

In some ways, volunteers will pose greater challenges to Jewish institutions than paid Encore careers exactly because they cannot be paid to do whatever work is placed before them. Yet the core issues may be the same for Baby Boomer volunteers or paid employees. Organizations and institutions will need to consider what flexibility they have in responding to the expressed needs of Baby Boomers for flexible schedules, time off to care for family members and opportunities to learn and find meaning. Given what we are learning about the increasing need for qualified professionals in the public service arena, minority communities may need to consider institutional changes that will maximize the number of Baby Boomers they can recruit for volunteer or paid Encore careers. In the end, the success of Bridge jobs and Encore careers will depend on whether institutions adapt to meet the dual demands of flexibility and meaningfulness while obtaining funding for these types of positions, which will need some form of compensation.

There is no shortage of studies that address the rise of more sophisticated volunteer opportunities alongside the growing interest in paid Encore careers.¹³ Even

¹³ See examples such as Philadelphia-based Coming of Age (www.ComingofAge.org), the National Council on Aging (www.ncoa.org), VolunteerMatch (www.volunteermatch.org) or Volunteers of America (www.voa.org).

within the focus groups that voiced their concerns about upgrading the volunteer opportunities in the Jewish community, many creative ideas are emerging. The Jewish Family Service of Palm Beach County has created an ambassadors program wherein trained volunteers serve as advocates for clients, helping them navigate obstacles to receive benefits and services. Los Angeles has developed a similar program of legal aid advocates who assist individuals with navigating the legal system. The New York Federation offered seed money to agencies to develop programs that would provide volunteer or paid Bridge jobs for Baby Boomers.

A number of synagogues have developed para-rabbinic and people-to-people programs that train members to provide services that in past generations have been the sole purview of ordained clergy (including opportunities such as providing *shiva* prayer services for families in mourning; leading alternative *minyanim* Sabbath prayer services; offering marriage, intermarriage, conversion and psychological counseling; and volunteer teaching). At least one seminary, Hebrew Union College-Jewish Institute of Religion, offers a specific training program for aspiring para-rabbinic volunteers. As the demands increase on service and religious institutions in America, we can anticipate that in spite of the deep concerns many have, volunteer opportunities will expand with a commensurate increase in allocations of funds to underwrite and support them.

Minority Institutions Will Need to Change to Keep Their Baby Boomers

Institutional Transformation Is Key to Link Baby Boomers to Public Service

The ML/CV Study provided a valuable comparison of those who already have Encore career public service employment and those who may be interested in such jobs. The study found that those who already made the move to Encore careers determined that many of the issues that had worried them did not occur. For one, job satisfaction was actually higher than anticipated (Peter D. Hart Research Associates, 2008a). A second study focused on employers found that many nonprofit organizations face talent shortages and want to hire experienced workers. This new survey found that seven out of ten nonprofit employers rated the experience that Encore workers bring to the job as a significant benefit. And nonprofits with experience in hiring late-career or recently retired workers were the most positive about hiring more. However, some of the 427 nonprofit employers surveyed still expressed concerns about entering this uncharted territory (Peter D. Hart Research Associates, 2008b).

In the Jewish community, and most probably in other ethnic and religious communities, transforming the existing institutional patterns of employment will be difficult. One Jewish communal professional's assessment was that, "Most of our organizations are set up for a normal career path—start low, move up over the years until you finally get a top job. Those on this path will not want to make way for Baby Boomers who jump ahead of them" (New York, Jan. 28, 2009). But for those institutions wanting to rethink their present professional and even volunteer structures, there are models to follow.

What Minority Communities Can Do to Mobilize Baby Boomers for Public Service

A study by the Conference Board, an organization that creates and disseminates knowledge about management and the marketplace, notes, "Nonprofit employers that have hired experienced workers or retirees from for-profit and government positions find that these people bring passion plus skills to their organizations" (Casner-Lotto, 2009, p.4). The study goes on to offer clear strategies and structures that the researchers conclude best assure successful adaptation to the nonprofit workplace and serious benefits to the nonprofit organization (5-11).

The Conference Board study concludes that Baby Boomers could be a net positive for nonprofit organizations: "At a time when demand for social services is peaking, nonprofits will need Boomer talent more than ever" (4). According to the organization, its strategies have assured smooth transitions and excellent results.

In looking at ways to engage Baby Boomers at the organizational and community levels, some focus group participants imagined a blending of generations, mentorship programs and opportunities to create multi-generational task forces. Others took the opposite approach by recommending a way to address elderly Baby Boomers:

We can't build up, so we will build out, creating side-by-side programs. Like what churches do, we can establish a church within a church with *minyán* prayer groups or community centers within existing institutions, a parallel

Strategies for Organizations to Engage Baby Boomers in Public Service

Examples of strategies for successfully engaging Baby Boomers in public service careers¹⁴ (many of which are good practices for the recruitment and hiring of any employee) include:

- Look to your volunteers and board members, past and present. Word-of-mouth and informal networking are the most effective recruitment resources.
- Brand the organization as a place where people can learn and grow. Create environments that encourage multi-generational teamwork.
- Offer flexibility, including part-time senior leadership positions, and health benefits to make up for lower nonprofit pay.
- Seek out individuals who combine passion with pragmatism, but don't expect the passion to develop overnight.
- Provide training to encourage employee flexibility and growth to take on multiple roles.
- Focus on transferable business skills and best practices. Pay attention to job design and ways to provide feedback. Listen to the sector switchers you already have.
- Provide orientation processes to acclimate newly hired Boomers to the nonprofit culture, including, if appropriate, a consensus-driven environment.
- Pay special attention to senior leadership transitions, including operating in a resource-constrained environment, fundraising and nonprofit board experience.
- Make sure your board and top leadership play a role in transitioning new Boomer employees.

Strategies for Minority Communities to Engage Baby Boomers in Public Service

There are steps minority communities can take, beyond those instituted by separate agencies and organizations, that would enhance the whole community's capacity to engage and effectively utilize Baby Boomers.¹⁵ These include:

- Support innovation and experimentation by individuals and organizations.
- Make it possible for new organizations to come into existence and for existing organizations to innovate.
- Draw champions and support from leaders across the ideological spectrum of the community.
- Work on the community-wide level and across institutions to professionalize human resource management.
- Expand recruitment efforts.
- Create communal (rather than just institutional) settings where best practices and leadership training models can be provided.

¹⁴Many of these recommendations have been drawn from the Conference Board. See Casner-Lotto, J. (2009). *A Perfect Match: How Nonprofits Are Tapping Into the Boomer Talent Pool* (p. 4). The Conference Board.

¹⁵The first three strategies listed here are from John S. Gomperts (2006-07). The second three are from the Conference Board's 2009 report; see Casner-Lotto, J. (2009).

organization just like we have for youth that springs free Baby Boomer talent and allows for individual initiatives run for and by Baby Boomers (New York, Jan. 28, 2010).

Evidence Does Not Allay Fears about Baby Boomers and Public Service Careers

Seeing the benefits of hiring Baby Boomers, though, did not allay the fears that were parallel and commensurate responses in each focus group. As one participant expressed, “The ‘old school’ understands the system even if they did not have the training or education. Now, people come in wanting to change things even before they know the system” (Miami, Oct. 27, 2009).

The social service and communal agencies that make up the organized Jewish community were structured to provide services for those who need it, so an added concern was voiced as, “In some ways, we are reversing—not how to fill a position, but how to satisfy people seeking meaningful work” (Los Angeles, Nov. 25, 2009).

Repeated concerns were that the focus on flexibility threatens the sense of obligation that is expected in a professional role or even high-level volunteer roles: “Will they show up? Will they be on time? How can we depend on them?” (Palm Beach County, Oct. 26, 2009). This leads immediately to questions of competence and training: “How much can we open the field before it undermines the integrity of the system?” (Los Angeles, Oct. 26, 2009). There is a perceived danger that this process of satisfying Baby Boomers will become a “Little Shop of Horrors,” with an ever-increasing demand of “Feed me.”

One community, in addressing the array of issues surrounding recruitment and mobilization of this age cohort, concluded, “We cannot retool so quickly to use Baby Boomers as professionals or even effectively as volunteers, so we are focusing our energies on the next generations. It is a matter of triage” (East Bay, Oct. 30, 2009).

Both the benefits and concerns were voiced, often by the same person, throughout the focus group interview process. The core sense was: “There is a psychic dislocation—we need to continue things that are crucial, but we also know that the system is dysfunctional as it is” (Miami, Oct. 27, 2009). These focus group participants do confirm the views of initiatives such as Civic Ventures, focusing invariably on the need for change, enlarging the field, utilizing the talent, and capitalizing on the potential positive impact of Baby Boomers on the Jewish community.

Enthusiasm for change was matched by anxiety about two crucial arenas: what impact would bringing in Baby Boomers as professionals or volunteers have on existing personnel and human resources systems and would flexibility and job meaning undermine the professional character of the institution?

In noting the absence of settings in the Jewish community to address the impact of Baby Boomers and the failure even of the few initial forays into exploring potential volunteer or professional options, one could easily conclude that “psychic dislocation” leads to decision-making paralysis—committee meetings, task forces and conferences that do not galvanize the leadership, foster no change and therefore produce no new initiatives. It will be hard for the Jewish community to address the future of Baby Boomers in the face of such inertia.

Yet the evidence of success is available. There is increasing confidence, based on the newest studies we have referenced, that the issues raised by those mostly concerned about change are navigable. At least at this early juncture, the concerns have proven less salient than anticipated. Yet there is diffidence by those in the field about their capacity to change to take advantage of this opportunity and ambivalence about the benefits of retooling to fit Baby Boomer needs.

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Baby Boomer Concerns and the Supports to Help Them in Encore Careers

The ML/CV 2008 survey allowed us to look both at those who may be interested in an Encore career and those who already are in some form of Encore career. It posed questions for both cohorts to uncover concerns about making such a transition. For those thinking about an Encore career, a number of concerns loomed large. Their greatest concern was carving out the flexible time they would need to take time off when desired (81 percent) or the time to take care of personal matters (71 percent). There was also concern over whether such a job would really be available (59 percent) and whether the income (68 percent) or the benefits (57 percent) would be adequate—something to consider during an economic downturn.¹⁶ A smaller percent were nervous about learning new technologies and skills (34 percent), facing discrimination over age (43 percent) and losing seniority and status (31 percent) (Peter D. Hart Research Associates 2008a).

Jewish Baby Boomers Voiced Fewer Concerns

The *Jewish Encore Survey* respondents who were interested in pursuing a public service paid position had a far lower level of concern about seeking an Encore career. Compared to the ML/CV study, only 68 percent evinced concern over being allowed enough flexibility, and fewer voiced anxiety over finding free time with their family (48 percent). About half thought it would be hard to find the work they wanted or were concerned about income or benefits. Other issues of potential concern received minimal responses such as a lack of technological skills (25 percent), loss of seniority (27 percent) and even age discrimination (37 percent). Once again, the Jewish respondents have fewer concerns, and one would assume, greater confidence in their ability to successfully navigate a public service Encore or Bridge career even if fewer are committed to take this route than are other Americans.

Of greater concern to all Baby Boomers in both surveys was the perceived inability to pursue alternative goals such as taking courses, reading and other forms of self-improvement that had been deferred during their careers to that point (see Table 10). Addressing such concerns and providing evidence of what has already been shown in the field may be key to convincing ambivalent Baby Boomers to seek public service paid or volunteer careers.

Supports that May Encourage Baby Boomers to Pursue Encore Careers

In terms of supports, both surveys posed a number of hypothetical questions to determine what would help promote Encore careers for Baby Boomers. Since one could choose as many supports as were deemed important, and since the cost of these supports was not mentioned, positive responses were not surprising. Even so, the differences between the respondents to each survey were striking (as shown in Table 11). In every category, a far larger percentage of Jewish respondents wanted to see services offered than in the ML/CV national survey.

¹⁶Yet a report by the John Hopkins Center for Civil Society Studies offers evidence that nonprofit jobs increase even in regions where overall employment does not due to economic recession, suggesting a “counter-cyclical” nature of nonprofit employment. They add that public service employment is distributed among a variety of fields, from arts and education to human services and religious affairs. As recently as 2004, nonprofits were adding jobs at a much higher rate than were employers as a whole. (See The Conference Board, *Boomers Are Ready for Nonprofits*, Literature Review/Issue E-0012-07-WG, May 31, 2007, pg. 12.)

Table 10: Baby Boomers’ concerns about seeking a public service career

	Civic Ventures		Jewish Encore
	Advanced Education	General	
It might be hard to find this kind of work	58	59	49
I would need to learn new technology and skills	32	34	25
I might face age stereotypes and discrimination	43	43	37
It might not leave me time for my family	70	71	48
There might not be adequate benefits	57	57	51
Hard to start over without seniority and status	30	31	27
It might not leave me time to travel, take courses or do other things I never had time for	68	68	66
I might not have flexibility to work only when I want	81	81	68
It might not pay the income I want or need	68	68	52

Programs that could match people who want to transition to working for government and nonprofits were supported by 59 percent of the ML/CV respondents and by 92 percent of the Jewish Encore respondents. Accelerated education and retraining programs that would teach new skills were affirmed as helpful by 61 percent of the ML/CV Baby Boomers and 93 percent of the Jewish Encore ones. This is especially interesting given the responses when both surveys asked if changing careers were to require more training, such as getting certification or going back to school, would make one more or less willing to consider an Encore career. Only 18 percent of the Jewish Encore participants thinking about an Encore career had interest in a certification or degree program, while 62 percent of ML/CV respondents thought they would be somewhat or much more likely to consider seeking a public service position if such programs were available.

Focus group participants viewed the need for training differently. As one noted, “I was outside the Jewish world. When I entered it, there were leadership training programs for [people] under 40, but it is not sexy to provide them for us. We need to create entry points that include training” (Los Angeles, Nov. 25, 2009).

When asked about loan forgiveness programs for those who need more education or retraining, only 45 percent of the ML/CV respondents found this a good idea while 74 percent of Jewish Baby Boomers endorsed such a program. Although earlier in the survey Jewish Baby Boomers voiced less concern about benefits than other Americans, once the issue of benefits was raised, 91 percent valued health benefits while only 79 percent of the ML/CV survey saw this as important. The same differentials were found when offering mid-life internships (88 percent vs. 55 percent) or providing online resources (91 percent vs. 67 percent).

Table 11: Types of support that would encourage Baby Boomers to pursue Encore public service careers

	Civic Ventures	Jewish Encore
Programs that help match people	59	92
Accelerated education or retraining programs	61	93
Loan forgiveness	45	74
Services that aid people in making a career transition	56	90
Access to affordable health care	79	91
An end to financial tax penalties	72	84
Mid-life internships	55	88
Online resources	67	91

The two groups were more closely aligned on efforts that would end financial penalties for continuing to work while receiving a pension (72 percent of ML/CV respondents and 84 percent of Jewish Encore respondents). Clearly, not being penalized for public service and providing financial supports for such work play a role in the thinking of Baby Boomers. It is significant to note that the federal government has begun responding to these concerns. HR 1388, the Edward M. Kennedy Serve America Act, has specific provisions addressing many Baby Boomer concerns by providing a variety of funding opportunities, fellowships and grants both for those moving into public service careers and to the institutions that hire them (Project Vote Smart, 2009-10).

Overall, the differential here between the expectations expressed in the ML/CV survey and the *Jewish Encore Survey* certainly raises questions of the anticipated concerns, feelings of entitlement and the need to receive special care or consideration held by Baby Boomers in the higher socio-economic class, and Jewish ones in particular.

No doubt, if interest in these supports translates into expectations, the concerns voiced by Jewish communal professionals that Baby Boomers will place heavy demands on an over-stretched system could be realized. As noted above, the discrepancy between what the Jewish Encore Baby Boomers said they are willing to do to move into Encore public service careers and the expectations they have for supports in making such a move will become an important factor for institutions to weigh in deciding how accommodating and/or responsive to be to this new cohort.

Public Service that Interests Jewish Baby Boomers Does Not Include Work in Traditional Social Services

In probing deeper to discern what truly interests Baby Boomers willing to consider some form of Encore career, both surveys asked about what types of jobs would be most appealing. Again, we see striking variations between the higher-educated ML/CV respondents and the

Jewish Baby Boomers. While more than 75 percent of the former found environmental work, teaching and working with children and youth appealing, only teaching approached that level of interest for the Jewish cohort. Both groups found working in health care or with the elderly less appealing, while the general respondents to the ML/CV survey rated these activities more positively. While fewer than a quarter (23 percent) of highly educated respondents to the ML/CV survey were interested in working with religious organizations and half (47 percent) of the general population of respondents found such work appealing, 86 percent of Jewish respondents expressed interest in working with the Jewish community, and more than a quarter (26 percent) were prepared to work with other religious communities (see Table 12). Of course, translating an interest in teaching or working with the Jewish community into a meaningful opportunity will still be a challenge; these results simply illuminate a willingness by Jewish Baby Boomers to consider these as Encore careers.

One comment from a Miami focus group participant was quite direct about what she and others felt: “We will need to find some way to reward women and men Boomers. They feel burnt out doing the same things and will want new challenges. Institutions will need to make any role challenging and interesting.” (Miami, Oct. 27, 2009).

“We will need to find some way to reward... Boomers. They feel burnt out doing the same things and will want new challenges. Institutions will need to make any role challenging and interesting.”

—Miami Focus Group Respondent

Table 12: Public service careers that would most interest Baby Boomers

	Civic Ventures		Jewish Encore
	Advanced Education	General	
Working to preserve the environment	76	76	59
Teaching at any level	80	74	75
Working with children and youth	76	76	66
Working in health care	39	42	29
Working with the elderly	28	57	34
Working on poverty issues	32	64	54
Working with the Jewish community	N/A	N/A	86
Working with a religious organization (unspecified religion)	23	47	26
Working to protect the safety of our communities	35	71	51

Jewish Baby Boomers Want to Work with the Jewish Community, But...

As Table 12 signals, Jews overwhelmingly found working with the Jewish community appealing, yet as shown in Table 13, when asked for their preference in seeking a full- or part-time Encore paid or volunteer career, 37 percent preferred doing this in the Jewish community, while 60 percent said that either a Jewish or non-Jewish organization would be fine (although younger Baby Boomers were more likely than older Baby Boomers to seek a Jewish organization). A tension begins to emerge in which the Jews surveyed—highly educated, wealthier by far than the average American, and Jewish-affiliated—seek involvement in the Jewish community yet are prepared to look elsewhere for meaning and support.

Table 13: Jewish Baby Boomers' preference for working in a Jewish or non-Jewish organization, by age

	Jewish Baby Boomers by Age			Total Response
	44 to 50	51 to 56	57 to 62	
I would prefer to work with a Jewish organization	41	36	36	37
I would prefer not to work with a Jewish organization	4	3	4	3
Either of the above would be fine	55	61	60	60

This willingness of affiliated Jews to look beyond the Jewish community for support and personal meaning is of central interest to this research and a salient concern when thinking how best to sustain minority allegiance. The lack of commitment to Jewish institutions becomes clearer when we view Table 14. While about a third of Jewish respondents were interested in working in such areas as Jewish education, synagogue work, Jewish agencies that care for Jews, political advocacy and social action, the greatest interest was in Jewish agencies or organizations that serve the wider community. Even with affiliated Jews, particularistic Jewish-focused goals showed limited appeal. We have now filtered possible responses to reveal the conflict facing Baby Boomer Jews and the dilemmas facing the Jewish community as a minority group seeking to provide opportunities for Jews to participate in the community. The Baby Boomer Jews of this study hold two values that are not

The Baby Boomer Jews of this study hold two values that are not integrated: To live out their public service by serving or working through the Jewish community and to seek life's meaning and purpose wherever it leads them, including outside the Jewish community.

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Table 14: Preferences for Jewish Baby Boomers interested in an Encore career in the Jewish community, by age

	Jewish Baby Boomers by Age			Total Response
	44 to 50	51 to 56	57 to 62	
Jewish education—teaching, assisting, administration and/or tutoring or synagogue ritual life	30	31	32	31
Jewish social service agencies that serve Jews	36	36	33	35
Jewish social service agencies that serve the wider community	39	41	40	40
Informal education and/or camping and travel programs for children and teens	22	19	15	18
Political and social action having to do with Israel or anti-Semitism	29	30	29	29
Political and social action having to do with universal issues such as human rights, the environment and interfaith engagement	31	33	33	33

The same ambivalence can be found in the choices these Baby Boomers would consider in order to navigate their future. In the survey questionnaire, we asked about organizations to which Baby Boomers are most likely to turn for help in finding public service work (as noted in Table 15). Approximately 40 percent said that they would be more likely to use a Jewish community agency—an opening for the Jewish community to provide Encore Baby Boomer resources. However, a clear majority (56 percent) claimed that the type of provider, whether government, non-sectarian or Jewish, was not important.

This ambivalence was amplified in the focus groups. Granted, many of the participants in the focus groups were Jewish professionals working in Jewish agencies, yet they were acutely aware of the Jewish commitment to serve the larger community. Jews will choose to use a Jewish agency, they claim, as long as it is equal to or better than a comparable non-Jewish agency. But there is little to support the assumption, or even the hope, that Baby Boomers will provide the same fidelity to the Jewish community that was assumed with the prior generation and upon which this minority community grew to depend. Their allegiance is up for grabs, and as Baby Boomers move into this new life passage, the competition for their attention and involvement will certainly increase.

Table 15: Where Jewish Baby Boomers would turn for support in seeking a public service career, by age

	Jewish Baby Boomers by Age			Total Response
	44 to 50	51 to 56	57 to 62	
A government agency	15	16	15	16
A Jewish community agency	40	42	39	40
A nonsectarian service	13	16	16	15
A for-profit company	5	6	5	5
Provider not important	55	57	57	56

Conclusion: How Minority Communities Respond Does Matter

Sociologist Steven M. Cohen sums up the need for a focus on Baby Boomers and the role that the Jewish community, its leaders and institutions can take:

We are coming to realize, hope, expect that we will live much longer than our parents. Just as our own kids get married later, creating a new young adult life stage, we are developing a new life stage that will need to be studied and addressed. As we near 60, we begin to think about these issues. So I am anticipating, imagining, that there are a lot of Jews doing this. Communally, we need to respond to this need to help them figure this out. Our objective should be to shape permission and expectations. What am I allowed to do? What am I expected to do? We can influence this discussion (New York, Jan. 28, 2010).

Minority communities, even those as organized as the Jewish community, do not necessarily have the resources and research to effectively shape permission and expectations and influence the discussion concerning Encore public service careers for Baby Boomers. Unlike major national efforts that are well funded and publicized, minority communities may find it difficult to marshal the resolve and effect the institutional changes necessary to create a public service Encore infrastructure. A. O. Hirschman, in his classic *Exit, Voice and Loyalty* (1970), reminds us that in American culture, loyalty to any institution easily turns to exit when voicing alternatives is suppressed and change is blocked: “Exit was shown to drive out voice... and...voice is likely to play an important role only on condition that exit is virtually ruled out” (76). So without major retooling to capture Baby Boomer attention and allegiance, an open society in which minority members can seek meaning and professional or volunteer fulfillment in any setting they choose will prevail. This certainly may serve the interests of the individual seeking a meaningful way to live her or his life, but it poses a serious challenge to minority groups unable to offer rich and vital life alternatives to their members. Exit is always a threat to any voluntary association in America. Since minority communities are voluntary associations, exit is a threat to their viability. The Jewish community, as one of many minority communities in America, must recognize that exit is a real choice for Baby Boomers dissatisfied with what the Jewish community has to offer them as they move into the next stage of their lives.

We can imagine that individuals who identify themselves as part of a religious, ethnic or national origin community and who are surveyed because they are so identified would be more prone to respond positively to using their experience, talents and skills to help support the minority community with which they identify. Yet, as this study indicates, this only seems to be true if the institution (for volunteers) or the experience (for those seeking paid careers) also provides meaning and if that which is offered by the minority community competes favorably with whatever else may be offered to Baby Boomers. Even a history of active participation in and affiliation with the institutions of the organized Jewish community does not necessarily lead those Jewish Baby Boomers who may seek an Encore career, for pay or as volunteers, to Jewish communal institutions.

Yet this study does indicate a clear preference for many of those surveyed here to use Jewish resources to plan their future and a willingness to entertain a professional or volunteer future in or through the Jewish community. Such potential interest provides an opening for Jewish

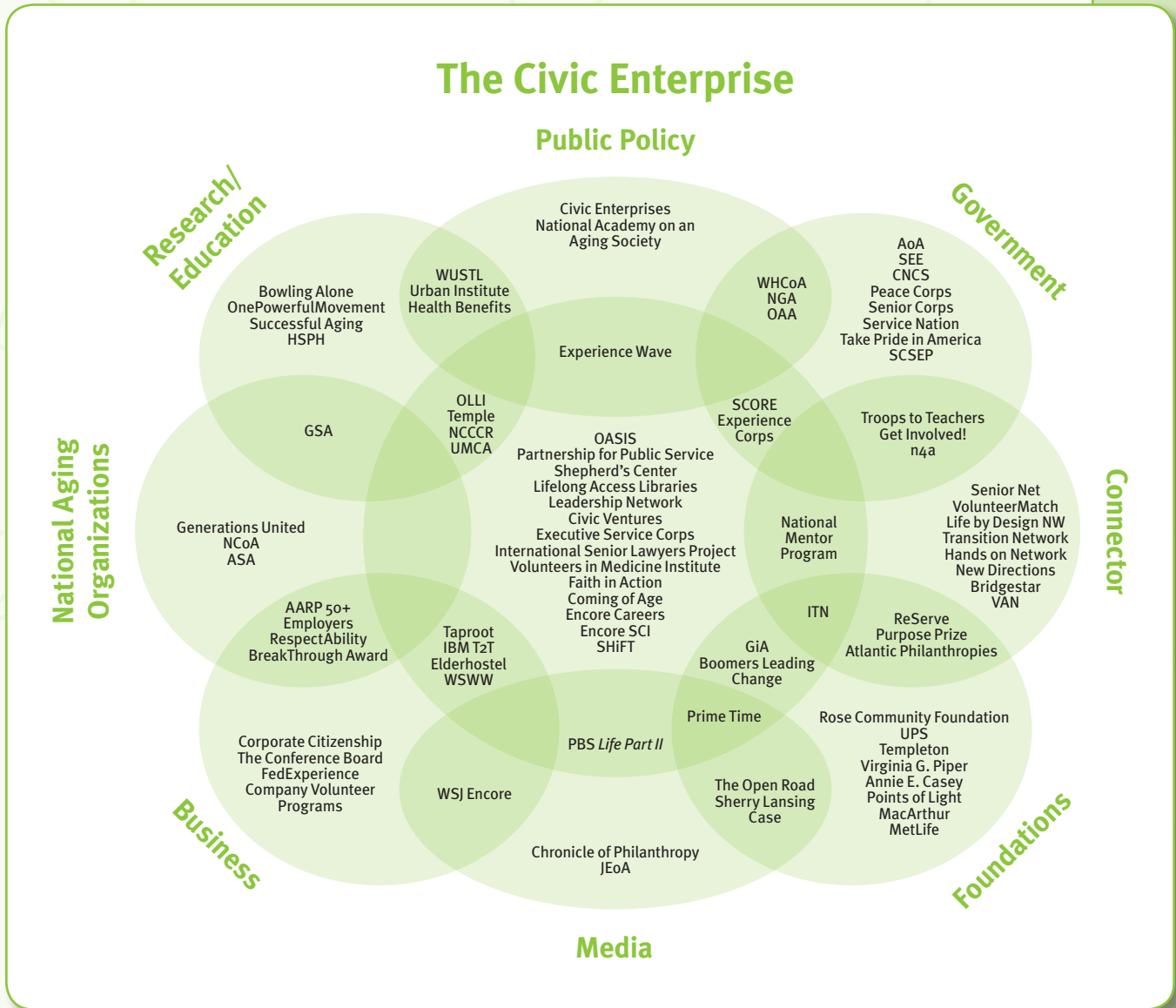
institutions to capitalize on the public service aspirations of a significant percentage of Jewish Baby Boomers as they move into their 60s and 70s. This means providing recruitment mechanisms, resources and supports for training and placement, meaningful work, flexible schedules and opportunities for growth and development, as well as expanding the range of options on the full continuum from volunteer work to part- or full-time Bridge jobs to full-time paid Encore careers.

These ideas, and others, will entail community dialogue and consensus-building that could reinforce efforts to engage Baby Boomers, transcending any one institution. The loose and fragmented structures of most minority communities are not presently so conducive to such community-wide efforts, although at least in local and national Jewish or Catholic communities in particular, there are robust mechanisms in place that could address and support communal efforts, if the will for change is present.

We return to the most basic fact: Baby Boomers represent the largest, wealthiest and best educated generational cohort in the history of the United States. In each stage of their lives, Baby Boomers have placed great demands on the institutional structures and on the norms and values of America. There is every reason to assume that as they age this influence will continue and their interests will need to be addressed. Finding pathways that will bring Baby Boomers into the communal institutional life of a minority community may be a prerequisite for that community to flourish in the United States in the coming years. This certainly would seem true for the Jewish community, where almost half of the active adult population are Baby Boomers. Addressing the question of how best to engage Baby Boomers is urgent.

This study offers some insights about this new phase of life, a survey that links Baby Boomers' search for meaning to the minority community with which they identify and some initial strategies that could maximize Baby Boomer involvement in the communal institutions of the Jewish community. *Baby Boomers, Public Service and Minority Communities* is one step in providing data and analysis that can support efforts by minority communities to engage Baby Boomers in public service and foster institutional changes that can be replicated across the continent.

Appendix 1: A diagram of efforts supporting Baby Boomer public service, provided by Greg O’Neil, director of the Public Policy Institute at the Gerontological Institute of America, 2010



Appendix 2: Jewish Federations that participated in the Jewish Encore Survey and the number of responses from each community

Cities, States and Regions	Final Adjusted Responses	Cities, States and Regions	Final Adjusted Responses
Atlanta, GA	509	New Mexico	47
Atlantic City, NJ	24	New Haven, CT	136
Baltimore, MD	305	Northern NJ	592
Boston, MA	343	New York City, Westchester, Long Island, NY	486
Broward County, FL	59	Oakland and East Bay, CA	197
Chicago, IL	820	Orange County, CA	37
Cincinnati, OH	374	Palm Beach County, FL	606
Cleveland, OH	991	Philadelphia, PA	179
Columbus, OH	285	Phoenix, AZ	688
Denver and all CO	499	Pittsburgh, PA	720
Houston, TX	301	Portland, OR	3
Jacksonville, FL	43	San Diego, CA	333
Los Angeles, CA	362	San Francisco, CA	341
Metrowest, NJ	79	Santa Barbara, CA	14
Miami Dade, FL	429	Seattle, WA	89
Milwaukee, WI	115	Tucson, AZ	381
Central NJ	41	Washington, DC; Northern VA; Southern MD	1,441
No Answer/refused	33	Other	231
Total responses			12,133

Appendix 3.1: Educational attainment for respondents to the Civic Ventures, National Jewish Population Survey and Jewish Encore Survey

Core Information: Education

	Civic Ventures	National Jewish Population Survey	Jewish Encore
High school or below	12	9	1
Some college	19	14	7
College degree	37	36	30
Graduate degree	30	41	61
No answer/refused	2	N/A	1
Total	100	100	100

Appendix 3.2: Annual income levels of respondents to the Civic Ventures, National Jewish Population Survey and Jewish Encore Survey

Core Information: Income

	Civic Ventures	National Jewish Population Survey	Jewish Encore
More than \$100,000	27	64	61
\$75,000 to \$100,000	17	16	10
\$50,000 to \$75,000	17	9	7
\$25,000 to \$50,000	13	6	4
Less than \$25,000	4	5	1
Not sure/no answer/refused	22	N/A	17
Total	100	100	100

Appendix 3.3: Marital status of respondents to the Civic Ventures, National Jewish Population Survey and Jewish Encore Survey

Core Information: Marital Status

	Civic Ventures	NJPS Federation Donors	Jewish Encore
Single/never married	8	6	5
Married	70	82	81
Separated/divorced	15	10	10
Widowed	3	2	2
Civil union	3	N/A	2
Not sure/no answer/refused	1	N/A	1
Total	100	100	100

Appendix 3.4: Jewish denominational affiliation of respondents to the National Jewish Population Survey and Jewish Encore Survey

Core Information: Jewish Denomination

	NJPS Federation Donors	Jewish Encore
Orthodox	9	8
Conservative	39	39
Reform	39	33
Reconstructionist	2	4
Just Jewish/no denomination	10	16

Appendix 3.5: Jewish identity markers of respondents to the National Jewish Population Survey and Jewish Encore Survey

Core Information: Affiliation

	National Jewish Population Survey	Jewish Encore
Member of a Jewish Community Center (JCC)	34	27
Have visited Israel	50	74
Belong to a synagogue	77	80
Participated in adult Jewish education in year before survey	51	58

Appendix 3.6: Jewish Encore Baby Boomers who responded affirmatively to select Jewish identity markers

	Yes	No	Not sure/ no answer
Usually attend services on Yom Kippur	90	10	1
Participate in Jewish social action or advocacy activities	60	36	4
Member of a Jewish Community Center (JCC)	27	72	2
Have visited Israel	76	23	1
Donated to the local UJA/Federation campaign in 2008	76	22	2
Donated to other Jewish organizations or causes	92	7	1
Attend Sabbath services once a month or more	48	51	1
Belong to a synagogue	77	22	1
Participate in some form of Jewish learning— not including Sabbath services	57	41	2

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About the Author

David Elcott, PhD, has spent the last 25 years at the intersection of community-building, the search for a theory of cross-boundary engagement, and interfaith and ethnic activism. In particular, he is focused on sustaining minority communities as part of a pluralist United States. Trained in political psychology at Columbia University, Dr. Elcott is the Taub Professor of Practice in Public Service and Leadership at NYU's Robert F. Wagner Graduate School of Public Service, senior research fellow at the Research Center for Leadership in Action, and Faculty Director of both NYU Wagner's Executive MPA program and the Dual Degree program in Jewish Studies and Public Administration. His present research is focused on the Baby Boomer cohort, Encore careers, and public service. He was formally the vice president of the National Center for Learning and Leadership, a think tank tasked with rethinking contemporary community and civic obligation. As interreligious affairs director of the American Jewish Committee and as the executive director of the Israel Policy Forum, David has addressed a wide array of public policy issues and has built interfaith and interethnic coalitions to address Middle East peace, immigration reform, civil liberties and workers rights. He has written *A Sacred Journey: The Jewish Quest for a Perfect World* and numerous articles and monographs on power and war, minority civic engagement and cross-cultural pluralism. He has participated in interfaith settings in Europe, South America and Asia.





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