

## PROCEEDINGS from the TAN Forum

# BOOMER ALERT! *Are you ready?*

Hamilton, Ontario

April 21, 2018

### Background

Baby boomers are becoming the next generation of third age learners. Objectives of this Forum were to consider the impact of Boomers joining our ranks; identify adaptations that local Third Age Learning (TAL) groups may need to make to attract them; and to find ways to engage Boomers as future leaders in TAL.

### Keynote Presentation

The Keynote was presented by Michelle Gold, a baby boomer herself, who participates in third age learning, and is a new member of TAN's Executive Committee. Her business Cadence Consulting, focuses on research, evaluation and strategy. Michelle shared demographic data and personal characteristics of the baby boomer generation; and identified key themes and issues from her interviews with third age learning organizations nationally and internationally. She began each interview by simply asking, "Are baby boomers on your radar?" From the replies she received, they certainly are!

TAL organizations in the UK, USA, France, Australia, and elsewhere in Canada shared their experience and approaches to: engage baby boomers; respond to high demand for programs; identify program interests, expand learning options, encourage volunteering; and broaden their leadership base. Details on what Michelle learned from the interviews are provided in the powerpoint from her presentation, attached to these proceedings.

Highlights include:

- Boomers are not a homogenous group
- Boomers tend to be active retirees
- The 'status quo' does not appeal to Boomers
- Boomers don't like the term "senior", and don't relate to it
- Boomers are tech savvy
- For many Boomers, learning how to maintain their health and wellness is a priority interest
- Boomers may prefer shorter, task oriented involvement vs. standing committees
- Boomers have much to offer existing TAL programs

## Discussion

Many Forum attendees identified as baby boomers; and the information conveyed in the presentation resonated with them. Newer TAL groups appear to have more boomers, than established groups. Participants in the Forum's small group discussions followed up on many of the issues raised in the presentation.

- Boomers are tech savvy and look for well-designed information available online. This has implications for how TAL groups communicate, provide registration and deliver learning. Many local TAL groups are already ramping up what they offer on their websites and on mobile devices.
- Many boomers are continuing to work in retirement. Some TAL groups are offering alternative options for their members to access third age learning beyond in-person day-time hours.
- Sold-out third age learning programs are common occurrences. Fairness in the registration process is of concern; and how to respond to the needs of those unable to join in.
- Space to deliver programs as well as accessibility is often challenging to arrange. Local groups are using a variety of approaches to address this issue : churches, theatres, community centres, libraries, etc.
- Recruiting new volunteer leadership is challenging for many TAL groups. It was recognised that oftentimes established groups have long-standing core members who wish to maintain the status quo. This discourages new folks from becoming involved, who are interested to introduce new ideas and approaches.



The challenges discussed in the Forum were found to be relevant to most TAL groups, and not exclusively associated with the influx of baby boomers.

The Forum generated a high level of interest, and we attracted more than the usual number of workshop attendees. Discussion at the Forum provided the opportunity for TAN

members to connect with participants from other communities, share experiences, and learn from peers who are innovating and seeking solutions to many of these issues.

## Going Forward

Questions raised during conversations at the Forum, included:

- Beyond promoting lifelong learning, a foundational goal of third age learning programs has been to increase social connections. How do we ensure that we are welcoming to new members, and reach out to diverse populations who are typically not involved in our programs?
- TAL groups in Ontario have historically depended on volunteers to organize programs. Has the time come to recruit staff with skills to meet the needs and the numbers of the next generation of third age learners?
- Given our inability to meet the high demand for third age learning programs, should we be encouraging the establishment of additional groups within local communities where there is high demand ?
- As leadership within TAL ages, how should we be introducing succession planning processes to support transitions to the next generation?
- Can videoconferencing be a useful tool to expand TAL opportunities? What is the impact on the social involvement that is so important?

Norm Archer, Professor at the DeGroot School of Business, an invited discussant to the Forum, was struck by the frustration expressed by so many TAN members being unable to meet high demand for third age learning programs in their community. He challenged us to shift our perspective and see this as an opportunity. Taking a more business-like approach, he counseled, has the potential to enhance TAL programs and reach more people. He suggested this might include raising fees, to acquire the space, staff and resources necessary to meet heightened demand. This idea was acknowledged, but not addressed during the Forum.

Participants indicated on the feedback form that they valued the networking opportunities provided by the Forum, and recommended that additional opportunities be created to continue to make connections among TAN members in Ontario.

Many TAN members indicated they were unfamiliar with information and resources provided on the TAN website. This includes contact information for other third age learning groups in our network for support and advice. The TAN website is in the process of being updated (Summer 2018). Please visit our website regularly [www.thirdagenetwork.ca](http://www.thirdagenetwork.ca)

**TAN Forum**

Hamilton, Ontario. April 21, 2018



# Boomer Alert

Are Third Age Learning Groups Ready?

Michelle Gold, Cadence Consulting

## Baby Boomers 54 to 72 yrs (born 1946 – 1964)

18 year span: *not one homogeneous group*

### Formative Years

- unprecedented level of higher education
- challenging status quo / trailblazers in speaking out
- redefining social conventions
- focus on self-realization and self-fulfilment

# Baby Boomers Today

## Boomers are turning Retirement “on its ear”

Canadians now retire between 50 – 75 yrs

- downsized workforce OR have \$\$: leave early
- no mandatory retirement: leave late

### *transitional retirement*

- flexible work options extend time in workplace
  - o part-time, interim, contingency, tele-commuting

### *working within retirement*

- fewer DB pensions + longer lives creating financial insecurity
- OR continue working for structure, engagement & challenge
  - o self-employed / seniorpreneur / new job

# Baby Boomers Today (cont'd)

- expectations of increased longevity in good health
  - *busy: work, travel, relationships, grandchildren, creativity, fitness + bucket lists*
  - *redefining aging experience*
  - *don't identify with 'senior' label*
- work environment required competency with computers, personal use of social media
  - *high level of computer skills & digital literacy*
  - *smartphone is now first source for info search*
  - *use of Facebook: family, friends & groups*

## Key Themes & Issues

### *From Conversations with*

- Ron Coreau      Lifetime Learning Centre Society, BC
- Gwen Dawe      Third Age Trust, U3A, United Kingdom
- Anne Greaveux      University Populaire, France
- Cathy Spark      Academy for Lifelong Learning, Toronto
- Steve Thaxton      Osher Lifelong Learning Institutes, USA

### *Review of Reports & Articles by*

Canadian Association for University Continuing Education  
Kamloops Adult Learners Society  
National Resource Centre for Osher Institutes  
Older Adult Centres Association of Ontario,      Statistics Canada  
U3A Network New South Wales Australia  
Universities Canada; and Marvin Formosa PhD

## Reaching Baby Boomers

- lack of awareness of TAL in many communities
  - many groups depend on word-of-mouth
- BB look online first
  - is your website SEO optimized?
  - set up for mobile views?
  - navigation based on user experience?
- ◆ *create an engaging, contemporary online presence*
- ◆ *BB not attracted to programs that identify themselves as targeted to seniors*
- ◆ *go out & introduce TAL in relevant settings*

## TAL: Unable to Meet Current Demand

- high demand means existing membership often can't register & access TAL programs
  - disincentive to attracting new members
- many TAL groups have inadequate space
- ◆ *provide online registration options*
- ◆ *lottery system to register, instead of 'first past the post' perceived as fairer*
- ◆ *seek new venues, including libraries, post-secondary settings, city services, community centres*
- ◆ *develop additional TAL groups in same community to manage demand*

## BB Learning Style

- many BB have experience with self-directed learning
  - due to upgrading skills for work
- familiar with online learning
  - MOOC, Udemy, post-secondary Continuing Education
- ◆ *BB can bring their experience to TAL to contribute to peer-based learning*
- ◆ *some TAL now offering online learning programs*
  - *provides option for those still working*

## BB Program Interests

There are varied approaches to TAL

- lecture based and peer-based learning
- BB identify many similar learning interests as older members in TAL, but rank their priorities differently [Osher Institutes]
  - #1 BB priority is health & wellness
  - history, fine art, current affairs, literature, philosophy

*“For those retiring earlier, programs geared to later life changes and transitions could be of interest, while for those delaying retirement... courses in evenings and weekends to prepare for second and continuing careers.”*

[Cdn Assoc for Univ Cont Educ]

## TAL: We Need Volunteers

- BB seek a welcoming, responsive experience to consider volunteering their time
- BB look for ‘professional’ approach within organizations, as an attractor to becoming involved
  - dislike ‘off the side of the desk’ approach
- ◆ *BB interested in shorter term / project based volunteer opportunities; task work with shared responsibilities*
- ◆ *BB more likely to volunteer a few years beyond retirement*
- ◆ *are TAL expecting volunteers to take on roles that if better resourced, would be done by staff?*

## TAL: We Like What We're Doing

- founding TAL members can be committed to their vision and stay rooted in their positions
  - potential for resistance to change when new ideas introduced
  - BB can feel unwelcome or dismissed
- need for balance between experienced members and making room for contribution of new people
- ◆ TAL leadership should have fixed terms of office
- ◆ mentor new volunteers
- ◆ introduce succession planning

## Baby Boomers

- can offer new ideas for TAL programs and delivery
- share working knowledge of how to incorporate technology into TAL
- provide opportunities for inter-generational social connections and dialogue among third age learners

TAN members are here today to discuss planning.

*“Programs have cycles. If we don't make a generational shift, then we might need to close it down and a new program will eventually be started.”*

[Key Informant]