INTEGRATION & SUPPORT CHECKLIST
[pages 49-51, 10 Steps for Engaging Adults 50+]

Use this checklist to assess your current capacity against these best practices.

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

COLLABORATE ON A WORK PLAN
☐ Establish goals.
☐ Create a timeline.
☐ Agree on deliverables.
☐ Hold regular meetings to review progress.

PROVIDE OPPORTUNITIES FOR TRAINING AND DEVELOPMENT
☐ Offer in-service training opportunities.
☐ Provide opportunities to use existing skills in new ways or different roles.
☐ Provide opportunities for leadership.
☐ Remain open to ideas that team members bring for their own skill development.

SHARE THE IMPACT
☐ Share stories on your website, in social media and other outlets.
☐ Share impact in reports to staff and funders and at meetings/conferences.
☐ Mobilize adults 50+ as ambassadors.

CREATE FEEDBACK LOOPS
☐ Offer opportunities to give and receive feedback in an open, accepting forum.
☐ Create a continuous improvement plan, in the spirit of lifelong learning.
RECOGNITION & COMMUNITY-BUILDING CHECKLIST
[pages 52-54, 10 Steps for Engaging Adults 50+]

Use this checklist as an inventory of ideas you can draw from in building recognition and community.

RECOGNITION
☐ Say hello, see how your volunteers are doing, and say THANK YOU!
☐ Put your thanks in writing with cards (or send holiday cards with thank you notes).
☐ Put a card, Post-It, or small treat on their desk acknowledging their good work.
☐ Social media fans love shout outs on Facebook, Twitter, Instagram, your website.
☐ Invite local news media to cover special milestones or great work by your volunteers.
☐ Recognize highlights: years of service, volunteer hours attained, special contributions.
☐ Tell a story about an individual volunteer’s work at a team/staff meeting.
☐ Provide business cards and designated work space (if appropriate) for volunteers.
☐ Write a memo to your CEO or executive leaders about something great they did.
☐ Highlight individual profiles on your website or in newsletters (interview them).
☐ Promote to new roles; pay stipends, where appropriate.

GIFTING
☐ Provide T-shirts, lanyards, badges, etc. to help them identify with the organization.
☐ Provide gift cards to local restaurants, coffee shops, bookstores, etc.
☐ Provide tickets to concerts, plays, behind the scenes tours, etc.
☐ Provide reduced-fee or discounted memberships to local gyms, yoga or other services.
☐ Give items with your logo to use or show off, e.g., canvas bags, notebooks, pens, mugs.

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

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