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the theory and practice of lifelong faith formation

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Faith Formation with Baby Boomers

Lifelong Faith

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Are Churches Ready for Aging Baby Boomers?

Welcome to Winter 2010 issue of *Lifelong Faith* on the theme of “Faith Formation with Baby Boomers.” Believe it or not, in 2011 the first members of the Baby Boomer Generation turn sixty-five years old. America is in the midst of a demographic revolution, but this revolution is about much more than longevity. It’s about the changing perspective of the Baby Boomers as they reach the “retirement years.” We are witnessing the emergence of a new stage of life between adult midlife—typically focused on career and child-rearing—and old age, traditionally marked by increasing frailty and decline. This new stage of life spans several decades and is characterized by generally good health, relative financial stability, and an active, engaged lifestyle.

Phyllis Moen, in her article “Midcourse: Navigating Retirement and a New Life Stage” writes, “[This is] the period in which individuals begin to think about, plan for, and actually disengage from their primary career occupations and the raising of children; develop new identities and new ways to be productively engaged; establish new patterns of relating to spouses, children, siblings, parents, friends; leave some existing relationships and begin new ones. As in adolescence, people in the midcourse years are thinking about and enacting role shifts that are both produces of their past and precursors of their future life course.”

Nearly every industry in society, from health care to entertainment, is scrambling to respond to this age wave that is crashing on our shores. ***Are churches ready for aging Baby Boomers?*** I have organized this issue into two major sections. The first section is a survey-summary of eight research studies that help us understand the life experiences of Baby Boomers as they move into this new stage of adulthood. The second section looks at a variety of approaches and ideas for faith formation with Baby Boomers, and offers a guide for developing your congregation’s plan for Baby Boomer faith formation. An added feature in this issue are three “wisdom” reflections by Joan Chittister, Richard Rohr, and Sara Lawrence-Lightfoot from their books about the second half or third chapter of life. Enjoy!

This issue of *Lifelong Faith* hopes to raise our awareness of the tremendous opportunities that congregations have to “seize the moment” and engage Baby Boomers in continuing their faith growth. Is your congregation ready to respond?

John Roberto, Editor



A Reflection on Ageism

From: *The Gift of Years: Growing Older Gracefully*

Joan Chittister, O.S.B.

“I am sixty-five and I guess that puts me in with the geriatrics,” James Thurber remarked. “But if there were fifteen months in every year, I’d only be forty-eight. That’s the trouble with us: We number everything.”

To be over sixty-five in an age like ours is to feel bad even when we feel good. We are, after all, “old” now. Except, we don’t feel “old.” And we don’t think “old.” And we work very hard at not looking “old”—whatever looking old is supposed to mean. But, oh, we have been taught to mind “old.” We’re too old to get a job, they tell us—but they want us to volunteer all the time. We’re too old to drive a car, they fear—but there are proportionally more automobile accidents caused by drivers between the ages of eighteen and twenty-five than by drivers over sixty-five. We’re too old to get health insurance—but we haven’t been seriously ill for years.

Which leads us to the larger questions, the real questions: what difference does it make how wise we are, how well we are, how alert we are, how involved we are after we’re sixty-five? After all once you reach retirement age in this culture, everything is cancelled. We’re “old” now, and we know it. And the rest of the world knows it, too. We’re “old”—translate “useless,” translate “unwanted,” translate “out of place,” translate “incompetent.” We are the over-the-hill gang, our birthday cards say. And we laugh—as well as we can—but, if truth were known, the laugh comes with a stab in the psyche.

We wince when we watch television. There we are in living color. Who could possibly like or want to identify with so much of what we see? Older characters on television are not the philosophers of our age, the sages or medicine women of past times. No, the elderly of our time are portrayed as frail and bumbling creatures who doddle along doing nothing, understanding nothing, aware of nothing, muttering. They’re “away with the fairies” as the Irish say.

These representations are now true, and we know that, too, because we’re it, we’re the real thing. And we do not bumble or doddle or mutter. We think very well, thank you, and we work hard and we know

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This article is reprinted from her book, *The Gift of Years: Growing Older Gracefully*. (BlueBridge Books, 2008) Used by permission.

precisely what is going on in the world around us. But what good does that do in a culture that begins to eliminate its experienced workers at the age of fifty-five on the basis of a stereotype which does not hold up under scrutiny, but which is very difficult to change.

Negative stereotypes exaggerate isolated characteristics and ignore positive characteristics entirely. So older people are portrayed as slow, but not as wise or patient. We see them as ill, but not as quite in charge of their own lives. We are reminded constantly that they forget things, but not a single note is made of the fact that everyone else does as well.

Worst of all, stereotypes absolutize characteristics, as if they were part and parcel of being black or being a woman or being old—or of being young, for that matter. We group people together, instead of seeing them as individuals who are full of grace, full of the spirit of life. We allow no chance for change, and so a stereotyped group begins to think of itself like this, too.

It is a pathetic moment in the history of the human condition when the outside world tells us who and what we are—and we start to believe it ourselves. Then, bent over from weight of negativity, we start to wither on the outside, just as we have already begun to wither within. The pace slows, the interest dims, the energy for life fades and fails.

But don't be fooled. Most of us, as Dylan Thomas said, go toward the end of life, raging "against the dying of the light."

Ed, in his late eighties, went to the club every day of his life, but only after he had finished at least nine holes of golf. Gus, in his seventies, played cards every afternoon and told jokes all afternoon as he did. Kathleen, almost ninety, worked in charitable agencies everywhere, day after day, because everybody wanted her and none of them could do without her. Tim, over eighty, was the highest rated volunteer in Meals on Wheels, organizing and delivering more meals a day than any younger worker in the system. Ted, in his seventies, a university trustee and once a banker and financial manager, acted as a consultant to nonprofit agencies in an attempt to enable them to achieve some kind of viability. No stereotype here. These elders were alive socially, engaged publicly, necessary to the community in which they lived.

The point is, we are the only icons of aging that younger people will get to meet. What we show them as we go, gives them a model of what

they, too, can strive for. We show them the way to the fullness of life.

For years now, researchers have known that only five percent of those over sixty-five are in special-care institutions, and eighty percent of the rest of the older population have no limitations to managing the rigors of daily living. With the rise of online shopping and banking services, that number is getting even larger by the day. And yes, more older people than younger ones have chronic illnesses, but they also have fewer acute illnesses than younger ones. They have few injuries in the home and also have few accidents on the highway. And with the new emphasis on gerontology, these rates are decreasing as well.

Even the notion of physical beauty depends more on what we truly see, rather than what we're just looking at. In Japan, for instance, silver hair and wrinkles are valued as signs of wisdom and service. In the West, walking a lot is a sign of vigor at any age. In other cultures, age alone—rather than physical attributes—gives social privilege. Obviously, physical attractiveness is culturally specific, not universal. Older people are just as physically attractive as young people, but different cultures define the meaning of "attractive" in different ways.

Finally, most older people retain their normal mental abilities, including short-term memory, their entire lives. They are just as able to learn and remember differently, and they may take longer to complete a project. Chronological age, however entrenched the stereotypes of its importance peddled on birthday cards, cartoons, and situation comedies may be, does not have a major influence on learning.

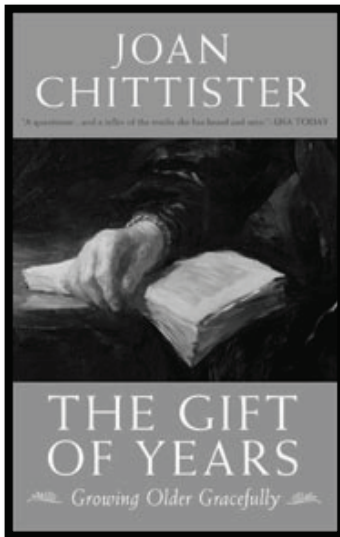
This and so much other scientific data—the reliability and accuracy of older workers, the rarity of mental illness among the elderly, the vibrancy of their emotional relationships as well as their capacity for sexual relations—has been known in the academic community for years now. It is tested over and over, and the findings both remain stable and become even stronger as a new generation of older people claim their natural right to live till they die.

What we may be forgetting in the light of such facts is that these gifts of aging well are not without spiritual meaning. "To those to whom much has been given," we know, "much is expected"—and that means us, too. Age does not forgive us our responsibility to give the world back to God a bit better than it was because we were here.

All the old jokes about old people are fast wearing thin now. Ageism is a lie. The only way to counter it, however, is to refuse to allow it to taint our lives. Age is not a thing to be pitied, to apologize for, to fear, to resist, to see as a sign of doom. Only the old can make age a bright and vibrant place to be. And so we must. If we don't, we stand to waste a full twenty-five to thirty-percent of our lives. And waste is always a pity.

A burden of these years is the danger that we might internalize the negative stereotypes of the aging process. We might become what we fear, and so abdicate our new call in in life.

A blessing of these years is that we are the ones whose responsibility it is to prove the stereotyping wrong, to give age its own fullness of life.



The Gift of Years: Growing Older Gracefully

Joan Chittister, O.S.B. (New York: BlueBridge Books, 2008) [\$13.95]

Not only accepting but also celebrating getting old, this inspirational and illuminating work looks at the many facets of the aging process, from purposes and challenges to struggles and surprises. Central throughout is a call to cherish the blessing of aging as a natural part of life that is active, productive, and deeply rewarding. Perhaps the most important dimension revealed lies in the awareness that there is a purpose to aging and intention built into every stage of life. Chittister reflects on many key issues, including the temptation towards isolation, the need to stay involved, the importance of health and well-being, what happens when old relationships end or shift, the fear of tomorrow, and the mystery of forever. Readers are encouraged to surmount their fears of getting older and find beauty in aging well.

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How Well Do You Know the Baby Boom Generation?

A Survey of Research & Analysis

Compiled by John Roberto

On Jan. 1, 2011, the oldest Baby Boomers will turn 65. Every day for the next 19 years, about 10,000 more will cross that threshold. By 2030, when all Baby Boomers will have turned 65, fully 18% of the nation's population will be at least that age, according to Pew Research Center population projections. Today, just 13% of Americans are ages 65 and older.

Baby Boomers, born between 1946 and 1964, are pioneering a new stage of life between adult midlife—typically focused on career and child-rearing—and old age. This new stage of life spans the decades of the 60s and 70s and is characterized by generally good health, relative financial stability, and an active, engaged lifestyle. With the oldest Boomers about to turn 65 (in 2011), tens of millions of Americans will soon enter this new stage of adulthood.

We are on the threshold of significant changes in our society, in our congregations, and in the lives of millions of people. But, what do we really know about the Baby Boom Generation as they move into their 60s? So much of what we see and hear is anecdotal—news headlines, personal stories, cultural trends, and remembrances of times gone by (think Woodstock). It might come as a surprise that we know a lot more about the first third of life (children, teens, and emerging adults)—psychologically, socially, culturally, and religiously, than we know about the Baby Boom Generation. Very few studies have been undertaken in the past decade on Baby Boomers as they enter their 60s. We have little current knowledge about the religious and spiritual needs of Baby Boomers today, and how to address those needs in our congregation.

This collection of studies and reports is intended to provide you with a survey of demographic, sociological, cultural, and religious research on the Baby Boom Generation today. I've done my best to find the most current research that might be helpful to congregations and their leaders. I have developed summaries from each of the reports, highlighting the key findings. Think of this survey as a series of windows into the lives of Baby Boomers as they enter their 60s. No report has the total picture, some even contradict each other. If you analyze these reports carefully, I think clues will emerge into the needs of this generation and the type of ministry and faith formation that congregations can develop to address Baby Boomers today.

Myths & Facts about Baby Boomers

Focalyst Insight Report (April 2008)

(Source: www.focalyst.com/Sites/focalyst/Content/KnowledgeCenter)

The data provided in this article are an analysis of over 17,000 Baby Boomers surveyed in the Focalyst View, the largest, most comprehensive study of Boomers and beyond.

Myth: Boomers are Retiring Early

There has been a lot of media attention lately given to the first Boomers thus being eligible to take Social Security benefits. But in actuality, very few Boomers are planning to stop working entirely when they reach retirement age—only 11%. Two-thirds of Boomers are already certain about their plans for when they reach retirement age—and more than 8 in 10 of those are planning to work or actively volunteer once they reach retirement age. Some of these Boomers may be planning to work due to financial need, but there is obviously another group that is planning to work as a means to stay actively engaged in society.

- Of those Boomers who know what they are planning to do when they reach retirement age, 72% plan to work either part (65%) or full-time (7%) after they reach retirement age, and many of these are planning to spend some time volunteering as well (31%).
- Thirteen million Boomers are already working in what they consider a second career.
- They are continuing their education—over 13 million Boomers are taking courses either towards a certificate or degree or for their own enjoyment.

Myth: Most Boomers are married empty nesters.

Most are actually not Empty Nesters! Data suggests that only about 1 in 4 Boomers fit the profile of married with adult children who have left home. A significant number still have children at home, the rise of the boomerang “adultolescents” means that

adult children are back in the home. Older parents may live in the home and require care. Still others are single and dating.

- Thirty-seven percent have children under 18 in the home.
- Over 5 million Boomers have had an adult child move back into the home in the past year.
- Almost 4 million Boomers have parents living in their home.
- A third of Boomers—over 23 million—are single. More than ever, the singles population consists not just of widows and widowers, but of those who have been separated or divorced, as well as those who have remained single all their lives out of choice. 8 million Boomers never married and another 4 million are living with a partner, but not married.

Almost 7 million Boomers recently started dating, and at least 1.7 million are participating in online dating. This is why online dating services have recently begun focusing campaigns toward older consumers looking for a partner—since 2000, the number of Boomers on Match.com is up 350%.¹ And whether married, partnered or single, Boomers care about how they look—68% say it is important to remain attractive to the opposite sex.

Myth: Boomers are all wealthy.

Boomers are the wealthiest generation in history, but only 9% are truly affluent (defined as having pre-tax incomes of \$150,000 or more if working, or \$100,000 or more if retired). Analysis of the Federal Reserve’s Survey of Consumer Finances indicates that while Boomers account for about half of the nation’s net worth in 2004 (the most recent available), the lowest 40% of this segment have virtually no net worth outside of home equity, with the lowest 20% having a net worth of only \$2,480.

Shockingly, one quarter of Boomers have no savings or investments at all. Boomers are resolving debts later in life. Loans to pay for children's educations and other expenses are taking precedence at a time when retirement planning and savings should be front and center.

- Twenty-five percent do not have any savings accounts or investments (not including their primary residence).
- One out of three do not own a basic retirement savings account.
- Nearly 4 in 10 have no life insurance.
- More than 4 out of 10 consider themselves spenders more than savers.

But they are not uniformly bad savers—57% say they have already taken steps to ensure they will have adequate income in retirement.

Myth: Boomers are winding down with age.

Actually, they are quite active, as the typical Boomer regularly participates in an average of 10 activities, and the participation extends beyond going to church or gardening.

- They are traveling—80% of Boomers took at least one trip last year.
- Almost half attended movies regularly, more than a quarter attended a music concert, and almost a third attended a live sports event.
- Boomers are twice as likely to be attending a concert than sewing or knitting.
- They are three times as likely to be bicycling or swimming than they are to be visiting spas.
- When they are at home, you are likely to find Boomers listening to music, gourmet cooking, or painting.

Participation in Select Activities

1. Listening to music:	68%
2. Dining out:	53%
3. Movies:	46%
4. Fitness walking/exercise walking:	42%
5. Religious/prayer services:	36%
6. Live sports events:	29%
7. Music/concert performances:	27%
8. Camping:	21%
9. Fitness work-out/aerobics:	19%
10. Gourmet cooking:	18%
11. Bicycling:	16%
12. Swimming:	16%
13. Hiking:	14%
14. Weight training:	14%
15. Photography as a hobby:	11%
16. Dancing:	9%
17. Jogging/running:	9%
18. Motorcycling:	8%
19. Painting/drawing/sculpting:	7%
20. Yoga/Pilates:	6%
21. Visiting spas:	5%

Myth: Boomers are technologically challenged.

When thinking about older consumers, many may conjure an image of somebody who still does not know how to change the clock on the VCR. Not Boomers! Boomers have been in the workforce during the evolution of computers, e-mail and the Internet, and were the first to understand the value of technology. Many have the discretionary income and desire to purchase high tech products, and many already own digital video recorders (29 million) MP3 players (17 million), and home theater equipment (19 million).

- Eighty-two percent of Boomers use the Internet, and their online activities extend beyond just e-mail to instant messaging, downloading music or movies, financial transactions, and online gaming.
- Sixty-four percent have been online for six years or more.
- Seven million Boomers with no children in the home own video game systems.
- Almost a third of bloggers are over the age of 45.²

- Pew Internet & American Life finds that almost half of those 50+ visit video sharing sites like YouTube.³

Myth: Baby Boomers are the “Me Generation.”

Boomers have typically been portrayed with the self-centered label, the “Me Generation,” but from their actions in later adulthood, Focalyst finds that a label of “We Generation” is more accurate. They are caring for others and caring for the world.

- Seventy percent say they have a responsibility to make the world a better place.
- Twenty-four percent volunteered for a charitable cause in the last year, and 15 million are planning to spend a significant amount of time volunteering when they reach retirement age.
- Five million are providing primary care for an elder, and 28 million have children under 18 in the home, which may or may not be their own (grandchildren, other relatives, blended families).
- Fifty-seven percent say they try to buy from companies that give back to their communities.
- They are becoming increasingly “green” consumers, with more than half (54%) seeking out environmentally friendly products, 48% preferring to buy locally produced goods, and 84% say it is important to support local retailers.

The desire to be “green” increases with age, as the older, Mature generation, is even more likely to be socially conscious. The data suggest that as Boomers grow older and consider the legacy they will leave behind, their desire to give back will intensify.

Myth: Boomers are all the same.

The media often portrays the members of the Baby Boom generation as a monolith—77 million people thinking, acting, behaving and buying all in the same way. Nothing could be further from the truth. In fact, members of the Boomer generation are more

different from one another when compared to members of either younger or older generations.

More life events occur between the ages of 50-65 than in any other time in one’s life, with the typical Boomer experiencing an average of 2 major recent life events around career, family, finance, or health each year. These events can range from buying a new home (11 million Boomers) to retirement (5 million Boomers) to starting a new job (7 million Boomers).

Life Events Most Likely to be Experienced by Boomers and at What Ages (Organized from youngest to oldest age ranges)

1. Began a new job (51-58)
2. Child began college (52-58)
3. Loss of job (53-59)
4. Unexpected debt (54-64)
5. Adult child moved back home (55-67)
6. Child got married (56-66)
7. Change in health for better (57-70)
8. Child graduated from college (56-66)
9. Bought a primary residence (56-66)
10. Reduction in income (57-67)
11. Birth of a grandchild (58-70)
12. Sold a home (59-70)
13. Change in health for worse (61-74)
14. Survived major illness/accident (61-74)

Two Boomers of the same age can be living very different lives, perhaps one becoming a parent for the first time, another retiring, and another taking courses toward a degree. This is especially true when thinking about leading vs. lagging Boomers, as the average 44 year-old could be substantially different from the average 62 year-old.

It is a mistake to think of this cohort as all alike, and it is not all about age. Recognizing the differences among Boomers and understanding the truth behind the myths can help marketers craft products, strategies, and messages that will resonate with this generation.

End Notes

¹ USA Today, February 27, 2007.

² BIGresearch SIMM, January 2008.

³ Pew Internet & American Life Project, December 2007.

Approaching 65: A Survey of Baby Boomers Turning 65 Years Old AARP Research & Strategic Analysis (2010)

(Source: www.aarp.org/research; <http://assets.aarp.org/rgcenter/general/approaching-65.pdf>)

The Baby Boom generation is the age cohort of Americans born between 1946 and 1964. At over 76 million people, Baby Boomers represent the largest single population growth in U.S. history and have had an enormous impact on every institution in the country, as well as lived through some of the most interesting times in American history.

As members of the Baby Boom generation continue to age, how will their identity inform their decisions about later life? Will they resemble their parents or will their group identity and unique experiences mean they approach later life in a different manner? We do know that in 2011, 2.5 million Boomers will turn 65. On average, this is about 7,000 people turning 65 every day between January 1 and December 31, 2011. By the end of 2011, there will be 41 million Americans 65 years old and over. The addition of the 2.5 million Boomers to that age group will mean that people over the age of 65 will comprise 17 percent of the adult population over 18.

As these 2.5 million people face their 65th birthdays, how do they assess their lives so far, and what do they expect the last third of the lives to be like? To find out AARP conducted a survey among a nationally representative sample of 801 individuals who will turn 65 in 2011.

Overall, the survey paints a picture of Boomers turning 65 as generally satisfied with their lives and optimistic about the next third of life. Financial security and improving their health are pervasive concerns. Their concerns about finances and health affect their outlook now, how they feel about the future, and what plans they are making. They expect and want more time with family and friends and are concerned about their children's futures. Like their parents before them, Boomers turning 65 do not plan to move. Aging in place is desirable since where they live now, is where they have established their lives.

In a few respects, Boomers turning 65 have age-related concerns similar to their parents when they

were 65. Like their parents, they want to age in place, and have found that aging often presents chronic health conditions and financial responsibilities that influence how they will live the last third of life.

Boomers turning 65 also demonstrate an interesting age-related mindset that was also common among their parents. Surveys of older persons often reveal attitudes and beliefs that indicate what might be called a "measured perspective." What this means is that while older persons generally have an optimistic view of the future, their experience and knowledge gives them a perspective that includes the possibility that things will not work out as planned. Some might call this realism based on experience or the wisdom of our elders. However we describe it, this perspective shows up in many older persons' attitudes about work, family, politics, and world affairs.

In one very important respect, Boomers turning 65 are different from their parents—the Baby Boom generation has redefined what retirement means. When their parents entered retirement, it was considered a time that might feature travel, relaxation, enjoyment, but little work outside of an avocation. Baby Boomers overall and many of those turning 65 consider work to be part of retirement and a significant percentage would say that they never will consider themselves retired.

In surveys of Baby Boomers conducted by AARP, 7 in 10 Baby Boomers project that they intend to work past traditional retirement age. While financial need is often mentioned as the reason for remaining in the workforce, these studies also show that the non-financial benefits of work often influence the decision to remain in the labor force. The AARP studies found that among Boomers the top non-monetary motivations to remain in the workforce include enjoyment, to have something interesting to do, and to stay physically active.

All of these surveys of Baby Boomers have predicted that members of this generation will continue to work in what their parents called

retirement. Yet the reality is that despite the desire and need to work, many may not be able to do so because of health considerations, age discrimination, or a declining economy. Our new survey of Boomers turning 65 indicates that as the moment of truth arrives and Boomers are faced with the decision about retirement, about half (54%) already consider themselves retired, while 46% are employed full or part time, not in the labor force for other reasons, or unemployed and looking for work. Of the 31% who are employed full or part time, over one-third say they have retired from a previous career and are still working.

Perhaps we should not be surprised at Boomers' interest in work. As one of the most educated generations in American history, Boomers have been said to sometimes define themselves in terms of their careers. It is easy to visualize and anticipate retirement if your job is physically demanding or simply the way you provided for your family. It is much harder to visualize retirement if your job is what you prepared for by spending years in school, spending more years in graduate or professional school, working long hours to advance at work, or practicing what you consider to be your life's work. Certainly not all Boomers fit this scenario but as a generation, they started the trend toward greater college attendance which led to the possibility of regarding employment as more than just a way to earn an income.

Selected Findings

1. **Boomers turning 65 are largely satisfied with their lives.** Seventy-eight percent of those turning 65 in 2011 say they are satisfied with the ways things are going in their lives today. This is almost identical to the 77% of Boomers turning 60 in 2006 who said they were satisfied.
2. **About 4 in 10 respondents feel they are about where they expected to be at this point in terms of their financial security and health.** However, more people feel they are worse off than feel they have done well in these same areas. Slight majorities feel they are about where they expected to be in their relationships, at work, and in their spiritual lives.

3. **Overall 7 in 10 Boomers turning 65 say they have achieved all or most of what they wanted out of life, and 26% say they have achieved some of what they wanted.** Only 3% say they have achieved little or none of what they wanted out of life.
4. **As they turn 65, the perennial goals of financial security, better health, travel, and time with family/friends are gifts 65 year-old Boomers want.** These items are largely the same gifts requested by Boomers turning 60 in 2006.
5. **The twin concerns of financial security (25%) and physical health (35%) are also paramount as items Boomers turning 65 want to improve in the next five years.** Among other items for possible improvement, work is only mentioned by 1%, relationships by 9%, spiritual life by 10%, and leisure activities by 11%. It is interesting that in 2006, a plurality of Boomers turning 60 (34%) said they would like to improve their health. In 2010, as they turn 65, Boomers are still making plans to improve their health, but may not be making any more headway than in 2006. Only 17% of people aged 60 to 64 are members of health clubs.
6. **Boomers turning 65 agree that their feelings about the next five years can be described as exciting, fulfilling, confident, hopeful, and optimistic, yet significant percentages also admit to feeling anxious, uncertain, and stressed.** Despite the substantial economic differences between 2006 and 2010, how Boomers describe their feelings about the next five years has not changed, perhaps illustrating the inherent optimism that sometimes characterizes this generation or perhaps demonstrating the measured perspective that comes with age.
7. **Taking better care of oneself, spending more time with family, traveling, volunteering, and making time for interests and hobbies are most often mentioned when Boomers turning 65 are asked what non-employment changes they have planned for the next few years.** Consistent with other surveys of near retirees, we see very few respondents planning to

relocate. Very small percentages plan to buy a large or smaller home or move to a different part of the country to be near family or enjoy better weather.

8. **While previous AARP surveys of Baby Boomers indicated that up to 70% of them expect to work past the age of 65, this survey of Boomers approaching 65 indicates that over half (54%) are already retired.** In addition, among 31% who are employed full or part time, over one-third of them say they have retired from a previous career.

Life Area Boomers Most Want to Improve Over Next Five Years
(Adults turning 65 in 2011)

	Percent
Physical health	35
Personal finances	25
Leisure activities	11
Religious / spiritual life	10
Relationships with family and friends	9
Work or career	1
None of these or don't know	8

Major Ambition or Dream for Next Five Years
(Adults turning 65 in 2011)

	Percent
Travel	18
Improve health	13
Retire and enjoy my remaining time	12
Improve finances	10
Enjoy grandchildren	5
Pursue hobbies, sports, dance, writing	5
Enjoy relationships with family and friends	4
Improve housing/living arrangements / home projects	4
Spiritual / religious pursuits	3
Win the lottery	3
Relocate	2
Don't know / nothing / others	21

Life Changes Planned for "Next Few Years"
(Adults turning 65 in 2011)

	Percent
Taking care of my physical health	84
Spending more time with loved ones	81
Spending more time on my interests and hobbies	76
Making more time to do the things I always wanted to do	74
Traveling more	61
Retiring from work completely	56
Cutting back on your work hours	55
Volunteering more	54
Taking classes or learning something new	44
Saving more aggressively for retirement	31
Moving to a smaller home	15
Going back to work	15
Moving to a different part of the country to enjoy better weather	11
Moving to a different part of the country to be near my family	7
Changing careers	5
Buy a second home	4
Moving to a bigger house	3
Move to another country	3

Baby Boomers Approach Age 65

Survey Findings about America's Largest Generation

D'Vera Cohn and Paul Taylor, Pew Research Center
(December 20, 2010)

(Source: <http://pewresearch.org/pubs/1834/baby-boomers-old-age-downbeat-pessimism>)

The iconic image of the Baby Boom generation is a 1960s-era snapshot of an exuberant, long-haired, rebellious young adult. That portrait wasn't entirely accurate even then, but it's hopelessly out of date now. This famously huge cohort of Americans finds itself in a funk as it approaches old age.

On Jan. 1, 2011, the oldest Baby Boomers will turn 65. Every day for the next 19 years, about 10,000 more will cross that threshold. By 2030, when all Baby Boomers will have turned 65, fully 18% of the nation's population will be at least that age, according to Pew Research Center population projections. Today, just 13% of Americans are ages 65 and older.

Perched on the front stoop of old age, Baby Boomers are more downbeat than other age groups about the trajectory of their own lives and about the direction of the nation as a whole.

Some of this pessimism is related to life cycle—for most people, middle age is the most demanding and stressful time of life. Some of the gloominess, however, appears to be particular to Boomers, who bounded onto the national stage in the 1960s with high hopes for remaking society, but who've spent most of their adulthood trailing other age cohorts in overall life satisfaction.

At the moment, the Baby Boomers are pretty glum. Fully 80% say they are dissatisfied with the way things are going in the country today, compared with 60% of those ages 18 to 29 (Millennials), 69% of those ages 30 to 45 (Generation Xers) and 76% of those ages 65 and older (the Silent and Greatest Generations), according to a Pew Research Center survey.

Boomers are also more downbeat than other adults about the long-term trajectory of their lives—and their children's. Some 21% say their own standard of living is lower than their parents' was at the age they are now; among all non-Boomer adults, just 14% feel this way, according to a May 2010 Pew Research survey. The same survey found that 34% of

Boomers believe their own children will not enjoy as good a standard of living as they themselves have now; by contrast, just 21% of non-Boomers say the same.

The 79-million-member Baby Boomer generation accounts for 26% of the total U.S. population. By force of numbers alone, they almost certainly will redefine old age in America, just as they've made their mark on teen culture, young adult life, and middle age.

But don't tell Boomers that old age starts at age 65. The typical Boomer believes that old age doesn't begin until age 72, according to a 2009 Pew Research survey. About half of all American adults say they feel younger than their actual age, but fully 61% of Boomers say this. In fact, the typical Boomer feels nine years younger than his or her chronological age.

On a range of social issues, Baby Boomers are more accepting of changes in American culture and mores than are adults ages 65 and older, though generally less tolerant than the young. On matters related to personal finances, economic security and retirement expectations, they feel more damaged by the Great Recession than do older adults.

Boomers are latecomers to the digital revolution, but are beginning to close their gadget and social media gap with younger generations. For example, among younger Boomers (ages 46-55), fully half now use social networks, compared with 20% in 2008. That rate of growth is more rapid than for younger generations. Also, more than half (55%) of older Boomers (ages 56-64) now watch online videos, compared with 30% in 2008.

Views on Social Change

When asked about the array of changes transforming American family life, the Boomers' views align more closely with younger generations than older ones. For example, Boomers, like younger

adults, are far more likely to say the main purpose of marriage is mutual happiness and fulfillment rather than child-raising (70% of Baby Boomers and Millennial young adults say so, compared with 50% of adults ages 65 and older).

When asked whether children face “a lot more challenges” growing up with divorced parents, racially mixed parents or unmarried parents, Baby Boomers and younger adults are less likely to say yes than are adults ages 65 and older.

However, despite the reputation they gained as young adults for favoring alternative lifestyles, Baby Boomers today are less accepting than younger Americans of same-sex couples raising children, unmarried couples living together, and other non-traditional arrangements—though they are more tolerant of them than are adults ages 65 and older.

When it comes to divorce, the Baby Boomers are less conservative than younger generations: 66% say divorce is preferable to staying in an unhappy marriage, compared with 54% of younger adults who say so.

Despite differences among generations on these and other matters, a 43%-plurality of Baby Boomers say there is less generational conflict now than in the 1960s and 1970s, when they were coming of age.

Personal Finances and Economic Views

Economically, Boomers are the most likely among all age groups to say they lost money on investments since the Great Recession began. Baby Boomers also are the most likely (57%) to say their household finances have worsened. And a higher share of Boomers than older Americans (but not younger ones) say they have cut spending in the past year.

Among those Baby Boomers ages 50 to 61 who are approaching the end of their working years, six-in-ten say they may have to postpone retirement. According to employment statistics, the older workforce is growing more rapidly than the younger workforce.

Technology and News

In their use of technology, the youngest Baby Boomers (ages 45-55) are nearly as likely to be online (and to have a home broadband connection) as younger adults, and the oldest Boomers (ages 56-

64) are notably more likely to be online than adults ages 65 and older.

Nearly two-thirds of Boomers say they follow the news most or all of the time, a higher share than among younger adults.

Religion

By standard measures such as the share who pray daily or frequency of attending religious services, Baby Boomers are less religious than adults ages 65 and older but more religious than adults in younger generations.

Among Baby Boomers, 43% say they are a “strong” member of their religion, a higher share than among younger adults and a lower share than among older ones. Four-in-ten say they attend religious services at least once a week. Conversely, 13% say they have no religious affiliation, less than younger adults but more than older adults.

Baby Boomers & Religious Attendance

Protestant:	50%
Evangelical Churches:	59%
Mainline Churches:	34%
Historic Black Churches:	65%
Catholic:	42%
Orthodox (ages 50+):	35%

Baby Boomers & Importance of Religion

(Religion is very important in my life.)

Protestant:	71%
Evangelical Churches:	81%
Mainline Churches:	51%
Historic Black Churches:	89%
Catholic:	57%
Orthodox (ages 50+):	65%

Baby Boomers & Religious Practices

Pray Daily	
Evangelical Churches:	80%
Mainline Churches:	53%
Historic Black Churches:	85%
Catholic Church:	61%
Orthodox (ages 50+):	69%
Read Scripture Weekly (all groups)	37%
Meditate Weekly (all groups)	46%

(Source: Pew Research)

The MetLife Report on Baby Boomers

MetLife Mature Market Institute

(Source: <http://www.metlife.com/mmi>)

The MetLife Report on Early Boomers How America's Leading Edge Baby Boomers Will Transform Aging, Work, and Retirement (September 2010)

It's been said many times: Baby Boomers are unique. Those born from 1946 to 1964 were not only larger than any previous age cohort, but almost from birth they have acted differently and in many ways re-defined every life stage they have passed through.

Today, in 2010, the leading edge of this generation, known as Early Boomers or as Leading Edge Boomers—those born 1946 thru 1955—are in their late fifties and early sixties (ages 55 to 64). During the next decade they will not just become the age cohort 65 to 74 years old, they will transform it.

Early Boomers are very different from their predecessors in the 55 to 64 age group in several important ways. Many more of them are college graduates, for example, and a higher percentage of Early Boomer men and women are in the workforce full-time, thus earning significantly higher wages than in the past.

These and other differences will have a profound effect on what Early Boomers will do in the near future regarding retirement. There is not much doubt that Early Boomers will redefine the transition from work to retirement. And they are already reinventing what it means to be a grandparent.

This report previews the 2010 Census by using federal survey data to document the unique demography of Early Boomers. Based on the survey data studied so far, we can say with some certainty that Early Boomers are quite likely to change both our perception and the reality of becoming “elderly.”

In the past, for example, we could expect that about three-quarters of men and women would be

fully retired within four to five years from their 65th birthday. But by the time the first Early Boomers approach age 70, we may see less than half of those ages 65 to 69 have retired.

Among the reasons: many of the institutional and personal issues that discouraged people from working after age 65 are falling away. On a personal level, many more older people are healthier than in the past so they are able to work. Many Early Boomers will keep working beyond age 65 in part because there are white-collar jobs for them, in part because many of them have financial obligations, and in part because many are concerned about outliving their retirement assets.

Key Findings

Part 1: Size and Educational Attainment

- Early Boomers, now numbering 36 million, have swelled the 55 to 64 age cohort more in the past decade than in the previous 30 years and made that cohort the largest it has ever been.
- Over the next 10 years aging Early Boomers will result in a 50% rise in the number of people 65 to 74 years old, a growth rate for that cohort not seen in 50 years.
- Early Boomer men, ages 60 to 64, have the highest level of educational attainment (37% college graduates) of any age group of men, which means they are more likely to work after age 65.

Part 2: Family Relationships

- There are 1.3 million more Early Boomer women than men. We project that by 2020 there will be 2 million more Early Boomer women than men. By then at least one-third of households age 65 to 74 will be headed by women.

- The Census Bureau reported that in 2009 one in four Early Boomer families had one or more of their children living with them, and that most of those children were adults.
- We estimate that at least two-thirds of Early Boomers are grandparents and the Census Bureau reports a rising number are responsible for their grandchildren.

Part 3: Workforce Participation

- The labor force participation rate of Early Boomer men and women is at a 15-year high and trends suggest that it will rise even higher in the future.
- Among working Early Boomers three-quarters of women and three-fifths of men had white-collar jobs that paid more than other jobs and were less physically demanding. That will certainly facilitate more of them staying in the workforce over the next decade.
- Many surveys of Baby Boomers have found a general acceptance of the advisability to stay in the workforce beyond age 65. What is almost certain to change, however, is the gender composition of the age 65+ workforce.

The MetLife Study of Boomers in the Middle: An In-Depth look at Americans Born 1952-1958 (March 2010)

The MMI study, *Boomers in the Middle*, examines those of the Baby Boomer cohort born 1952-1958, and who will be 52-58 years old in 2010.

In many areas, the Middle Boomers fall into a category of their own, resembling neither their older nor younger counterparts, but rather bridging the gap between the Oldest and Youngest Boomers. However, in some areas they tend to favor the attitudes and behaviors of either side of the Boomer spectrum. In many ways, they truly resemble the “middle child” characterized in many families as being in the difficult position of missing the attention given to both older and younger siblings,

and experiencing the challenge of establishing a strong identity in the family.

What often remains unacknowledged is that the Middle Boomers are the largest of the three segments studied so far, and represent the demographic core of the Boomers. Made up of about 29 million members, this segment represents about 38% of all Baby Boomers and about 10% of the total U.S. population.

Summary of Key Findings

- More than half of Middle Boomers still have children living at home, and about half have grandchildren. Two-thirds have at least one parent still alive, making them a good example of the proverbial “sandwich generation.”
- More than 60% of the Middle Boomers are working full-time with 68% of men and 53% of women in this category. Another 8% are working part-time,
- Six percent are self-employed, and 5% are looking for work. An additional 7% are on disability, and 8% are fully retired.
- Most Middle Boomers describe themselves as being in good health, but at the same time are concerned about being able to afford health care costs in the future.
- Middle Boomers would like to retire at age 65 but do not think they will be able to do so until age 66, not a great difference in view of the economic turbulence they have experienced. Their plans to do so have not changed in the last two years despite economic challenges. They expect the largest portion of their retirement income (42%) to come from Social Security benefits, with another third from 401(k) and defined contribution plans.
- Middle Boomers on average plan to take their Social Security benefits at age 65, well before they are eligible for full benefits, between ages 66 and 66 and 10 months. About one in five plan to apply for benefits as early as age 62. Almost one-quarter anticipate applying for benefits at a later date than they had originally planned; 69% have not changed their plans, and 6% are planning on an earlier than planned application.

- The vast majority are homeowners (86%) with an average home value of \$272,600. Fifteen percent would consider using a reverse mortgage for retirement income funding.
- More than half of the Middle Boomers feel that they are behind in their retirement savings, while about one-third feel they are on track or have already achieved their financial goals, about equal to the Youngest Boomers.
- About one-third expect an inheritance from their parents, averaging \$181,000, while another 21% have already received an inheritance averaging about \$120,000.
- Seventy-two percent have been providing financial assistance and support to their grown children and grandchildren averaging about \$38,000 over the past five years.
- Almost two-thirds of Middle Boomers like the term “Baby Boomer” to describe themselves, a somewhat smaller percentage than the Oldest Boomers and larger percentage than the Youngest Boomers’ affiliation with that generational description.
- The two key historical events they remember as affecting them were the Vietnam War and the assassination of President John F. Kennedy — both events occurring in their childhoods and early adulthoods and closely affiliated with the Oldest Boomers in significance. They also believe that the most significant things setting their generation apart were the sheer size of the cohort, political and social activism, and the women’s liberation movement.
- Turning age 50 was “no big deal” for the majority of Middle Boomers, and they do not feel that they will actually be “old” until age 75, older than the age selected by the Youngest Boomers (age 71) but less than the age of 78 selected by the Oldest Boomers.
- Like both the Oldest and Youngest Boomers, Middle Boomers consider changing/declining health as the major downside of getting older, while simply being alive is the best thing about being their age.
- Middle Boomers are experiencing a shift in their life priorities in the past few years with more of

them concentrating more on family, financial security, and personal well-being and wellness, particularly among women.

Family

The majority (71%) of the Middle Boomers surveyed are married or in a domestic partnership. In general, they are men with a spouse who is two years younger, and women with a spouse who is two to three years older. Twelve percent are currently divorced or separated, 4% are widow(er)s, and 13% have never been married.

Unlike the Oldest Boomers, the Middle Boomers are not empty nesters. Half of them still have children at home, although they are not as likely to do so as the Youngest Boomers. While many have children still living at home, half (48% of the Middle Boomers have grandchildren compared to 14% of the Youngest Boomers and 77% of the Oldest Boomers. African-American respondents were significantly more likely to be grandparents than Whites/Caucasians. Almost three-quarters of African-Americans (73%) have grandchildren compared to fewer than half (44%) of Whites/Caucasians.

The Middle Boomers are starting to transition to the point when it is more common to have lost both parents, while the Youngest Boomers typically still have both parents living. About one-quarter (23%) of the Middle Boomers still have both parents alive, and 43% have lost one parent. The remaining 34% have lost both parents. African-Americans are less likely to have both parents alive than Whites/Caucasians. Of those with only one parent still alive, it is more likely for that parent to be the mother (75%). Mothers of the Middle Boomers are, on average, 79 years old, and fathers are about 80 years old.

Even though the number of living parents differs from that of the Youngest and Oldest Boomers, a similar percentage of Middle Boomers are providing regular care to a parent or older relative. Under one in five (14%) are providing this type of care, on average about 10 hours per week. This is slightly more time than the Youngest Boomers are spending (9 hours), but slightly less than the Oldest Boomers (11 hours). About one in five (18%) of these Middle Boomer caregivers are spending more than 20 hours per week providing care.

Health Care

Like the Oldest and Youngest Boomers, the Middle Boomers report they are generally healthy, with over half (56%) who say their health is very good to excellent. This is in line with current federal data from the National Center for Health Statistics which indicate 59% of 45- to 54-year-olds and 52% of 55- to 64-year-olds report they are in very good to excellent health.

Looking ahead, while 56% report they are healthy, one-quarter (26%) of this group report their biggest concern about their retirement is being able to afford health care. Three in ten (31%) of those reporting fair or poor health are also primarily concerned with being able to afford health care in retirement.

Employment and Retirement

The majority of the Middle Boomers are still working (74% of men, and 64% of women), either full-time or part-time. Only 8% are fully retired, while 19% of the Oldest Boomers are fully retired.

Retirement is on the horizon for many Middle Boomers, though for some not for another 14 years or so. On average, the Middle Boomers plan to retire at age 65; although they believe they will not be able to retire until age 66. For many (55%), there have been no changes in their retirement plans compared to two years ago, despite the economic challenges during that time. However, almost four in ten (37%) report that they have delayed their retirement age, while 7% plan to retire earlier than expected.

Life Priorities

The majority (60%) of the Middle Boomers indicate that their personal or life priorities have shifted in the last five to ten years. This is especially true for women and those who are divorced, separated, or widowed.

Family, personal well-being and wellness, and financial security were the top three areas that received more attention in the last five to ten years, while finding meaning in life and having a comfortable community or home were moved more to the back burner.

Likely due to the economy, financial security was in the forefront for many people, not just the Middle Boomers.

Priority Shifts in the Last 5–10 Years

	More attention/emphasis	Less attention/emphasis	No change
Family	65%	4%	29%
Financial security	64%	10%	25%
Finding meaning & purpose in your life	48%	12%	39%
Personal well-being & wellness	66%	8%	26%
A comfortable community and/or home	40%	9%	50%

The majority of Middle Boomers feel that their personal priorities have shifted in the last decade. As might be expected because of both moving closer to retirement and the economic volatility of the past few years, most Middle Boomers who have experienced this shift have been giving more attention and emphasis to their financial security over the last five to ten years. However, equally as many have been giving increased attention to their families and their personal well-being and wellness. Given the extreme economic circumstances they have been facing, this finding attests to the significant and powerful influence of shifting priorities toward family and wellness issues as we mature. A large proportion have also been placing greater emphasis on finding purpose and meaning in their lives.

These findings are consistent with other MMI research about the increasing importance of family, meaning, and personal health as we age. It reinforces the fact that maturity allows for a re-examination and new prioritization of life issues in the second half of life — a life stage in which Middle Boomers are increasingly engaging and which they will certainly shape to their own identity.

Six Baby Boomer Segments

Yankelovich Boomer Dreams Study

(Source: *Generation Ageless*. J. Walker Smith and Ann Clurman. New York: Collins, 2007.)

Baby Boomers agree universally on a number of things: perceptions about youthfulness, impact, possibility, and passion as well as zealous self-interests related to health, vitality, and social connections, especially with grandchildren. In others, all middle age-less Boomers think in terms related to immortality and morality.

These shared attitudes constitute the major dynamics that will inspire Boomers as they set their courses for the next stages in the lives. However, in addition to this blend of core beliefs are a variety of areas in which Boomers are not in agreement, and these are important, too.

For the most part, assessments of Boomers treat the cohort as if it is an undifferentiated whole. This is not entirely inaccurate, but such treatments overlooked numerous minority opinions that are no less important just because they are not shared by all. Few studies have probed the manifold character of the Baby Boom. One objective of the Yankelovich Boomer Dreams study was to look at Boomers in this way.

In our research we segmented Boomers into discrete attitudinal groups, each with a distinctive set of top or first priorities. Three broad dimensions of first priorities differentiate groups of Boomers: the spiritual, the personal, and the societal. All three have some degree of importance for every group, but what distinguishes one group from another is the greater or less importance of each.

These three priority areas identify six distinct groups of Boomers. Each group has its own way of thinking about what it wants from the future. These differences add up to a Boomer agenda for tomorrow that can be identified only by assessing Boomers as a diverse group.

Six Segments

The Yankelovich Boomer Dreams study included 174 items measuring attitudes across a comprehensive set of values and ambitions comprising dozens of dimensions. Segmenting Boomers on these dimensions yields six distinct groups. Thumbnail

descriptions of these groups are provided on the chart. These six groups differ in several key ways.

- **Straight Arrows:** This is the one group of Boomers for whom spiritual priorities are foremost. They make up one-third of Boomers. They are driven by traditional values and religion. They look forward to sharing their beliefs with others.
- **Due Diligents:** This is one of three groups for which personal priorities are most important. They represent 10 percent of Boomers. They think ahead and plan for the worst. They are willing to take risks, though, as long as they feel protected.
- **Maximizers:** Personal priorities are at the top for this group. They account for 15 percent of Boomers. They want to do as much as possible and get the most from life. They seek fulfillment by immersing themselves in everything possible.
- **Sideliners:** Personal priorities matter for this group, too. They make up 20 percent of Boomers. They are less involved in all activities and amusements. They are very private, self-contained, and undemanding.
- **Dis/Contenteds:** This is one of two groups for which societal priorities are highest. They account for only 8 percent of Boomers. They see social problems they would like to fix, and their sympathies are with protesters. However, they shy away from getting involved to the point of compromising their own comfort.
- **Re-Activists:** Societal priorities are highest for this group as well. They represent 15 percent of Boomers. They are ready to join campaigns in support of social causes. They want to get involved while they still can, before age makes it difficult for them to have an impact.

Boomer Segments

Worldview	Thumbnail	Future Focus
Straight Arrows: 33% (25 million)		
Orthodoxy Balance Big Idea: Morality	Traditional values define core beliefs as well as the focus on the future.	To find ways to enhance and share important personal beliefs and ethics.
Due Diligents: 10% (7 million)		
Anticipation Prudence Big Idea: Safety Nets	Think things through and look out for pitfalls then plunge into life.	To enjoy safe adventures that are protected and secure while radical and extreme.
Maximizers: 15% (11 million)		
More Meaning Big Idea: Relevance	Want to continue to achieve, accumulate, stay involved, and hold center stage	To push forward aggressively in order to stay active, engaged and in control.
Sideliners: 20% (15 million)		
Detachment Presumptuousness Big Idea: Self-sufficiency	Aloof and separated with less enthusiasm for anything except self-involvement.	To be as self-contained as possible for enjoyments that are moderate and undemanding.
Diss/Contentedness: 8% (6 million)		
Skepticism Comfort Big Idea: Purpose	Dissatisfied and challenging the status quo, but not to the point of spoiling comfort.	To connect with a broader vision or mission that restores and renews hope and trust.
Re-Activists: 15% (15 million)		
Social Causes Self-Discovery Big Idea: Last Call	Poised and ready to get heavily reinvolved in saving the world.	To re-engage with bigger ideals and movements before the chance is gone forever.

It's evident from these short summaries that these six groups have very different ambitions for the future.

The mean age for all groups is forty-nine, plus or minus one year (as of 2006). There are only modest differences when looking at the cohort partitioned

by birth years. Middle Boomers make up the bulk of each segment.

These small differences by age and cohort subdivision directly rebut one criticism of looking at Baby Boomers as a unified cohort. The argument that Boomers born in different decades are more different than alike and thus cannot be grouped together. Yet these results show that neither age nor birth year is a discriminating factor for attitudes. In other words, younger Boomers do not cluster by themselves in one segment with a particular set of attitudes while older Boomers cluster by themselves in another segment with a different set of attitudes. Younger and older Boomers are found in roughly similar proportions across all attitudinal segments. Attitudes differ, but not as a function of age or birth year.

On the other hand, Sideliners and Diss/Contenteds are much more likely to be men, showing that Boomer men are a bit more likely than Boomer women to be found in groups that prefer a passive style of taking part in their interests.

Whites are the majority for each segment, but only by a small margin for Maximizers. African-Americans are concentrated in the segment consisting of people who want the most they can get from every aspect of life. Hispanics make up a great percentage of Maximizers and Re-Activists, both high-involvement, high energy groups.

Most Boomers in each segment are employed. Few are retired, especially among Maximizers and Re-Activists. The higher percentage of disabled Due Diligents may account for some of their caution and worry.

Sideliners are less educated, perhaps accounting for their reluctance to be more actively engaged in a self-inventive world. Maximizers, Diss/Contenteds, and Re-Activists are the best educated, although the percentage of Straight Arrows with a graduate degree is high, too.

Most Boomers in each segment are married. Maximizers and Diss/Contenteds have higher proportions of singles.

The demographic characteristics do show some relationship to certain kinds of attitudes, particularly at the extremes. Straight Arrows are a traditionally orientated group with a skew toward family households and great attendance at places of worship. Unsurprisingly, they are also the most conservative.

Diss/Contenteds and Re-Activists are the most liberal groups, as well as the groups more concerned

with social issues. They are less likely to consist of family households. They also tend to be higher income, better educated, and employed.

Lifestyle Attitudes of Baby Boomers

(% who indicated Agree and Strongly Agree)

1. People should try to maintain a youthful spirit about life. (96.6%)
2. The possibilities afforded to us by technology are only going to continue to grow. (96.6%)
3. I trust my instincts. (95.2%)
4. I am very passionate about the causes I care about. (94.8%)
5. The actions of a single individual can make a big difference in life. (94.8%)
6. People have a responsibility to leave the world a better place than they found it. (94.2%)
7. We are all responsible to leave the world a better place when we leave it. (93.8%)
8. I think it is important for all of us to look for ways in which we can get involved and improve society. (93.7%)
9. Young people can learn a lot from my generation. (92.6%)
10. There is no reason why young people and older people can't enjoy the same kinds of things. (92.2%)
11. I like to keep up with politics and public issues. (92.2%)
12. I have been able to make a meaningful contribution in my job. (90.8%)
13. I know how to use technology to make my life more interesting and more enjoyable. (90.2%)
14. Without passion and zeal by individual people, important social problems won't ever be solved. (90.2%)
15. I feel a responsibility to help others out and support the common good. (89.9%)
16. The challenges our society faces in the future are formidable and alarming. (89.6%)
17. There is no reason that you have to feel less vital and energetic as you get older. (89%)
18. Businesses have a social responsibility to their employees and to the community. (88.9%)
19. In the future, older people will be much more active and engaged than older people in the past. (88.7%)
20. I like to know what young people are doing and creating. (87.7%)

Other Items of Interest

- Living a clean, moral life is a very important value. (87.4%)
 - Personal enrichment is very important to me. (81.8%)
 - Being spiritually fulfilled is extremely important to me. (75.8%)
 - Being a good grandparent is my top priority in life. (71.6%)
-

Looking at the Future

(% who rated an item with a 5-7 score on a 7-point scale)

1. Having an active lifestyle (85%)
 2. Making money (83.2%)
 3. Home and family (80.1%)
 4. Spending (77.2%)
 5. Social causes (74.3%)
 6. Debt (74.3%)
 7. Youthfulness (73.3%)
 8. Political activism (73.1%)
 9. Equality (72.4%)
 10. Environmentalism (72.4%)
 11. Making a contribution (72.3%)
 12. Social justice (71.4%)
 13. Making a difference (70.6%)
 14. Shaping the future (69.3%)
 15. Charity (68.4%)
 16. A quiet lifestyle (67%)
 17. Marriage (66.9%)
 18. Women's rights (66.6%)
 19. Taking on new challenges (66.3%)
 20. Working hard (66.2%)
-

Worries about Retirement

(% who rated an item with a 5-7 score on a 7-point scale)

Top 8 (all over 50%)

1. Having sufficient health-care insurance coverage (70.4%)
 2. Getting sick and frail (66.5%)
 3. Having enough money to get by on (63.9%)
 4. Being able to live independently (62.8%)
 5. Not being mentally sharp (62.8%)
 6. Being short on energy and vitality (59.4%)
 7. No longer being able to live life to the fullest (51.8%)
 8. Being in charge of your affairs (50.1%)
-

Investing Energy & Time for the Next 5-10 Years

(% who rated an item with a 5-7 score on a 7-point scale)

1. Focusing more time and energy on your grandchildren (80%)
 2. Spending more time with family (77.2%)
 3. Reading more books (76.3%)
 4. Getting more out of life (75.4%)
 5. Taking more control over your future (73.6%)
 6. Doing thing I've always wanted to do (73.5%)
 7. Having enough money to get by (72.4%)
 8. Learning a new skill or hobby (71%)
 9. Having new adventures that are exciting and fun (70.7%)
 10. Planning your retirement (68.1%)
11. Making new friends (67.4%)
 12. Saving for/spending money on my grandchildren (67.4%)
 13. Forgiving yourself more (66.7%)
 14. Getting more involved in social causes that matter to you (66.1%)
 15. Deepening and strengthening your relationship with God (65.3%)
 16. Develop new skills and expertise (64.8%)
 17. Working to make your community a better place (64.3%)
 18. Expressing yourself in more creative ways (63.6%)
 19. Unleashing your personal potential (63.1%)
 20. Taking courses to learn something new (62.8%)

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(Source: <http://www.metlife.com/mmi>)

Good Life Activities

Richard Leider, author of several books including *The Power of Purpose: Find Meaning, Live Longer, Better*, has done extensive work in helping people discover their unique purpose and meaning in their lives. Leider describes the achievement of a positive balance in life—where a person is, among other things, excited to get up every morning—summarily as achieving the Good Life. He makes it clear that living the Good Life is not just about material wealth and physical comfort, but equally “living in the place you belong, with the people you love, while doing the right work on purpose.”

The Good Life requires an integration of various components in a person’s life, in which each component enables the next. Leider defines living the Good Life using four components: Money, Medicine, Meaning, and Place. He believes that as people age they face shifting social values and, in order to maintain the Good Life, they will need to rebalance these core components. The relative value that people place on these core components can be measured by looking at how people prioritize various activities associated with either Money, Medicine, Meaning, or Place.

Importance of “Good Life” Activities

Boomers 45-54 Years Old

1. Spending time with friends and family
2. Taking caring of your physical self
3. Enjoying personal interests
4. Working to generate a satisfactory salary from a full- or part-time job
5. Ensuring you have enough income to last the rest of your life
6. Enjoying your surroundings (place: home, community)

Boomers 55-64 Years Old

1. Spending time with friends and family
2. Taking care of your physical self
3. Enjoying personal interests
4. Ensuring that you have enough income to last the rest of your life
5. Enjoying your personal surroundings (place: home, community)
6. Working to generate a satisfactory salary from a full- or part-time job

Among both groups “Helping make things better for others” and “Spiritual involvement for your mind and soul” were #10 and #11 out of the thirteen activities.

Triggers and Transitions

Richard Leider describes attaining the Good Life not as a destination, but rather as an ongoing journey—one marked by a series of transitions. Very often these transitions are a time of tremendous insecurity and are most often the result of “trigger events” which are dramatic and often create unexpected change. These positive or negative events may or may not be in their control and can throw off their equilibrium in life. In order to move through this process and achieve a new balance, people must make decisions that often require difficult trade-offs among the core components.

According to Leider, these transitions are made up of three phases:

- **Unpacking**, or letting go of the way things used to be, involves sorting out what is really important and makes them happy from what is not important and holds them back.
- **Repacking**, or taking hold of the new way that will allow people to attain their Good Life, involves the clarification of values, new goals, and the discovery of new tools for getting there. It is the process of mapping

out the road ahead— one that will truly take them where they want to go with the life essentials they want to bring along the way.

- **Limbo** is a state of flux and uncertainty between unpacking and repacking. It is a period where people’s vision of what they want their future to be is uncertain, or where they lack focus on the most important aspects that will get them closer to their Good Life.

According to Leider, people must learn how to make trade-offs that “lighten their load” by unpacking those aspects which burden them with unnecessary or unproductive activities in order to repack and better focus on the most important goals and aspects of their lives. For purposes of the study, the process of unpacking was termed “focus” (on essentials) and the process of repacking was termed “vision” (of the future).

People pursue a positive state of being, called the Good Life, by continually rebalancing their priorities among various activities that can be assigned into the four core components of Money, Medicine, Meaning, and Place. The process of pursuing the Good Life is likened to a journey made up of numerous transitions brought on by external trigger events which need to be resolved through three phases called unpacking, repacking, and limbo. Throughout this journey, people need to achieve a balanced level of vision and focus in order to appropriately make the trade-offs that allow them to live the Good Life.

While most people manage multiple significant positive and negative challenges (trigger events) in their lives, those facing multiple recent trigger events are most likely to go into a period of transition, or limbo, where a reprioritization of life choices is a necessary part of pursuing the Good Life.

Trigger events can greatly influence how people experience their lives. Respondents were asked to indicate which of 23 negative, positive, and neutral life events they had experienced over the past year. The chart shows the percentage of respondents who have experienced each of the trigger events in the past year. Many respondents had experienced a death or illness of someone close to them. Overall, 59% experienced some negative event in that time period.

These trigger events can have a tremendous and tumultuous impact on the ability to have a clear

vision of the future and capacity to concentrate on the important essentials for getting there (focus). Those who have difficulty with these two aspects of the Good Life also experienced one of the following: an illness or disability of someone close to them, problems with family relationships, a major financial loss, or problems at work.

Trigger Events Experienced by 45-74 Year Olds Over the Past Year

1. Death of someone close to you: 21%
 2. Illness or disability of someone close to you: 17%
 3. Caregiving for an elderly relative: 13%
 4. Problems with family relationships: 13%
 5. Major financial loss: 12%
 6. Problems at work: 12%
 7. Birth or adoption of a grandchild: 9%
 8. Caregiving for a child or grandchild: 9%
 9. A major unforeseen change in your health status: 9%
 10. New job for you: 8%
 11. Your retirement: 7%
 12. Your unforeseen illness or disability: 7%
 13. A major unforeseen change in the health status of your spouse: 6%
 14. Relocation to a new home: 6%
 15. Your spouse’s retirement: 4%
-

Life Priorities: Five Groups

Based on how people prioritize what is most important to them, they can be grouped into five basic groups: Meaning-Minded, Balanced Individualists, Balanced Givers, Financially Focused, and Hyper-Individualists. The three largest groups, Balanced Givers, Meaning-Minded, and Balanced Individualists, each represent approximately 30% of the total sample.

Balanced Givers

The Balanced Givers, the largest group, represent 33% of the total sample. Respondents in this category tend to focus more on those activities which emphasize helping others, as well as doing

things that matter to them personally. Some activities include helping to make things better for others and using their abilities to accomplish meaningful goals and activities for themselves. They tend to be more evenly dispersed in their allocation of life points to these activities, giving significance to their name, Balanced Givers. The Balanced Givers are more likely to be younger, male, working full-time, with moderate income, and moderate assets. Forty-six percent of Balanced Givers are 45 to 54 years old, compared to 28% who are 55 to 64 years old, and 26% who are 65 to 74 years old. Sixty-two percent of Balanced Givers are employed full-time, while 20% are retired. Seventy-four percent of Balanced Givers earn \$100K or more, compared to 26% who earn under \$100K.

Meaning-Minded

Another of the larger groups, the Meaning-Minded, plan to focus more time on activities such as being with friends and family, enjoying their surroundings, and enjoying personal interests, the core activities defining the Good Life, but also emphasizing spiritual involvement for their minds and souls.

The Meaning-Minded are more likely to be older, female, retired, with more assets, and with moderate income. Of the Meaning-Minded group, 52% are age 65 to 74, 32% are age 55 to 64, and 16% are age 45 to 54. Sixty-four percent of the Meaning-Minded are retired, while 23% are employed full-time. Forty-nine percent have investable assets of \$500K or more, while 34% have investable assets of less than \$250K.

Balanced Individualists

The Balanced Individualists tend to allocate more importance to activities that focus on personal interests. For example, some of the most selected activities include taking care of their physical selves and enjoying personal interests. They feel that Meaning-related activities are still important, but less so than the Meaning-Minded and somewhat more so than Balanced Givers.

The Balanced Individualists are more likely to be younger, male, working full-time, with moderate income, and more assets. Fifty-seven percent of Balanced Individualists are employed full-time, and 32% are retired. Forty-two percent of respondents in this segment earn \$100K to just under \$150K.

Seventy-one percent have investable assets of \$250K or more.

Financially Focused

The Financially Focused spend considerable attention and energy on activities like building income, improving their salaries, and increasing their net worth, with much less attention to activities enhancing meaning and purpose in themselves or in their communities. They are most likely to be male (64%) and younger. Thirty-six percent of the Financially Focused are age 45 to 54, 41% are age 55 to 64, and 23% are age 65 to 74. The Financially Focused are more likely to be employed full-time (72%) and have higher incomes. Just under three quarters (72%) earn more than \$100K per year.

Hyper-Individualists

Hyper-Individualists tend to concentrate primarily on their own needs and activities in comparison to activities with family, their spiritual lives, or their communities. Respondents in this segment are more likely to be male (64%), age 55 to 64 (45%), and have higher incomes. Eighty-two percent of Hyper-Individualists earn more than \$100K per year.

Comparisons Among the Five Groups

When asked to rate their level of focus, vision, and purpose, 69% of the Meaning-Minded reported having focus, compared to 56% of Balanced Givers, and 60% of Balanced Individualists (see Figure 20). Just under three quarters (73%) of Hyper-Individualists reported having focus.

More than two thirds (68%) of the Meaning-Minded reported having vision compared to half (49%) of the Balanced Givers and 56% of the Balanced Individualists. Seventy-four percent of those classified as Meaning-Minded said their lives have purpose compared to 51% of Balanced Givers and 57% of Balanced Individualists.

When asked to what extent they feel they are now living the Good Life, more of the Meaning-Minded respondents said they were living the Good Life (73%), compared to those classified as Balanced Givers (44%) and Balanced Individualists (51%). The Financially Focused were least likely to report they are living the Good Life (23%).

Lifelong Learning Activities in the 55+ Population

Road Scholar / Elderhostel

(www.roadscholar.org/ein/research-project.asp)

This research project was designed to understand the activities and attitudes of a national sample of Americans 55 and older. We analyzed data from our quantitative survey to create segments based on mental stimulation or lifelong-learning activities, various psychological measures, and demographics. The segmentation analysis yielded five distinct segments ranging in size from 11% to 34% of the 55+ population. We then studied the segments carefully to create descriptive names for these segments.

The first two segments, including **Focused Mental Achievers** and **Contented Recreational Learners**, together represent a group of older Americans who are very active, committed and self-sufficient when it comes to mental stimulation and lifelong learning.

The next two segments, including **Anxious Searchers** and **Isolated Homebodies**, make up a group that is engaged only modestly in mental stimulation and lifelong learning. Individuals in these segments we believe would benefit from more active engagement.

The last segment—**Pessimists**—includes individuals who are more focused on basic issues of survival and have pressing concerns that could prohibit them from seeking out lifelong learning activities.

Focused Mental Achievers

Focused Mental Achievers (13.0% of the surveyed 55+ U.S. population) are thirsty for learning of almost every imaginable kind, outpacing all other segments in participation in almost every activity. They're especially drawn to challenging academic pursuits; on a once-a-month-or-more basis 14.1% study a foreign language (more than four times the rate of any other segment), and 65.7% read nonfiction books. At a rate more than double any other segment they participate in the following activities on a once- a-month-or-more basis: reading classical or literary novels (43.5%), astronomy (13.8%), listening to books on tape (17.3%), and genealogy (18.0%). Several activities especially popular with Focused Mental Achievers are both

intellectually stimulating and socially rewarding; 29.4% attend a class in person once a month or more, and 10.8% participate in a book club once a month or more. Focused Mental Achievers on average participate in 17.6 of the surveyed activities weekly. The average age of Focused Mental Achievers is 65.1 years.

Focused Mental Achievers are also oriented toward their communities, giving while also receiving a social benefit in return: 31.6% volunteer for a community- sponsored activity, 26.2% serve as nonpaid members of the board of a charitable or volunteer organization (more than twice the rate of any other segment), and 20.0% volunteer time to teach, either as a coach, a mentor, a literacy instructor or in some other capacity.

They're also disproportionately drawn to both experiencing culture and creating their own cultural experiences; on a once-a-week-or-more basis 66.5% watch PBS television programs, 14.4% play a musical instrument, 46.3% write, and once a month or more 41.1% visit museums, libraries or art exhibits.

Focused Mental Achievers are physically active: on a once-a-month-or-more basis, 20.8% dance, 22.4% participate in group aerobic exercise, 35.0% lift weights, 20.8% run. Some of their activities blend physical activity with social, intellectual or creative activities. Seven percent (more than three times any other group) participate once a month or more in acting, drama or community-based theater.

Focused Mental Achievers are interested in seeing and experiencing the broader world, as well as seeking mental stimulation and lifelong learning closer to home. More than half (53.8%) hold a valid passport, and 69.3% have traveled overnight in the past five years to attend a class, seminar or learning event. They are undaunted (only 9.0% strongly agreed with the statement "I don't like to fly right now") and ready to go (45.4% strongly agreed that "If I wanted to, I could easily find time to schedule a two-week trip somewhere").

Focused Mental Achievers are optimistic (with a 117 optimism index against the national sample) and satisfied with life (115 index). Meanwhile, 66.5% strongly self identify as "true life-long learners." Two

thirds (66.8%) know someone who is suffering from dementia or Alzheimer's; 92.1% agree or strongly agree with the statement: "If you don't continue to use your mind as you age, you will be more likely to suffer from memory loss, dementia, or Alzheimer's [disease]."

Not surprisingly, Focused Mental Achievers are highly educated and relatively healthy: 52.9% graduated from college or more; 59.4% self reported "very good" or "excellent" health, and 54.0% exercise three or more times per week.

Contented Recreational Learners

Contented Recreational Learners (34.0% of 55+ U.S. population) are as optimistic (117 index) and satisfied (112 index) as Focused Mental Achievers, but only 43.1% strongly characterize themselves as "true life-long learners." Their interest in academic pursuits is distinct but moderate: on a once-a-month-or-more basis, 1.7% of Contented Recreational Learners study a foreign language, 37.4% read nonfiction books, and 5.5% listen to lectures, seminars or classes on tape. Interest in activities that are both intellectual and social is also modest: 14.9% attend a class in person once a month or more; 3.2% attend a book club once a month or more, and 27.7% play cards with friends once a month or more. Contented Recreational Learners participate in an average of 13.2 surveyed activities weekly. Their average age is 68.2.

Contented Recreational Learners are more moderately interested in giving back to their communities; 19.4% volunteer monthly for a community-sponsored activity.

They're very interested in cultural or artistic experiences and personal creative expression, though less so than Focused Mental Achievers: on a once-a-week-or-more basis 52.3% watch PBS television programs; 5.6% play a musical instrument; 18.6% write, and once a month or more 13.7% visit museums, libraries or art museums.

Contented Recreational Learners are physically active: 61.1% walk for exercise; 10.2% cycle, and (in season) 48.9% garden once a week or more.

Also, 40.8% of Contented Recreational Learners hold a valid passport, only 10.7% "don't like to fly right now," and 30.8% could find time to schedule a two-week trip somewhere.

Contented Recreational Learners are less well-educated than Focused Mental Achievers; 29.0% have college degrees or higher. While fewer Contented Recreational Learners (41.6%) than Focused Mental Achievers (52.1%) report household incomes of \$50,000 or more, Contented Recreational Learners are more relaxed about their financial situation: fewer Contented Recreational Learners (32.0%) than Focused Mental Achievers (36.6%) report concern about their financial future.

Overall, Contented Recreational Learners are optimistic, satisfied, and laid-back. They're active intellectually, physically and socially, but perhaps less intense about it all than their Focused Mental Achiever counterparts. Contented Recreational Learners, for example, had a mean score of 3.14 (out of 5) on the question "It's easy for me to relax;" Focused Mental Achievers had a mean score of 2.96.

Anxious Searchers

Anxious Searchers (23.0% of the surveyed 55+ U.S. population) participate in activities at roughly the same rate as Contented Recreational Learners, yet they're more agitated and less optimistic and satisfied than their Contented Recreational Learner counterparts, with below-average levels of optimism (86 index) and life satisfaction (85 index). Anxious Searchers are involved in an average of 12.1 surveyed activities weekly. The average age of Anxious Searchers is 66.4.

Like Contented Recreational Learners, their interest in academic pursuits is distinct but moderate: on a once-a-month-or-more basis 3.3% of Anxious Searchers study a foreign language, 41.1% read nonfiction books, and 10.5% listen to lectures, seminars or classes on tape. In addition, 13.9% attend a class in person once a month or more and 5.4% attend a book club once a month or more.

Anxious Searchers are relatively withdrawn from their communities; only 11.9% volunteer once a month or more for a community-sponsored activity.

They're also less interested than individuals in the first two segments in cultural or artistic experiences or in personal creative expression; on a once-a-week-or-more basis 49.1% watch PBS television programs; 4.4% play a musical instrument; 22.3% write, and once a month or more 14.5% visit museums, libraries, or art museums.

Anxious Searchers are nearly as active physically as Contented Recreational Learners: 52.6% walk for

exercise, 4.0% cycle, and (in season) 49.2% garden once a week or more.

Anxious Searcher involvement in travel is low. Only 27.7% have valid passports and 21.3% strongly agree that they “don’t like to fly right now.”

Anxious Searchers are somewhat less well-educated than Contented Recreational Learners; 22.8% graduated from college or more.

Anxious Searchers have real concerns about their well-being; 43.9% report that their health “isn’t very good right now,” and 58.9% have real concerns about their financial future. Also, 19.3% reported significant stress, strain or pressure during the past few months, no doubt attributable to health and financial issues.

Overall Anxious Searchers are moderately engaged in lifelong learning but—possibly because of physical or financial restraints—have less social engagement than either Focused Mental Achievers or Contented Recreational Learners. Only 26.9% self report as “true lifelong learners.”

Isolated Homebodies

Isolated Homebodies (18.0% of the surveyed 55+ U.S. population) have average levels of optimism (94 index) and life satisfaction (97 index). They have low levels of interest in academic-oriented pursuits; on a once-a-week-or-more basis only 2.5% attend a class in person and only 4.3% read nonfiction books. Isolated Homebodies are involved in an average of 7.4 surveyed activities weekly. Their average age is 67.2.

Isolated Homebodies are distinguished from the three segments described above by comparatively low levels of participation in activities that take you out of the house and into contact with other people. Only 5.4%, for example, sing in a chorus or other group; the next lowest group, Anxious Searchers, participate at a 16.5% rate. Similarly, only 5.1% attend a class in person (compared to 13.9% of Anxious Searchers), 4.7% dance (compared to 10.1% of Anxious Searchers), and no respondents classified as Isolated Homebodies attended a book club.

Isolated Homebodies have distinctly lower levels of participation in physical activities; on a once a week or more basis 34.3% walk for exercise, 5.1% cycle, and 33.2% garden (in season).

Only 14.1% of Isolated Homebodies hold valid passports, and only 3.7% went on a group tour to an

international destination other than Canada in the last 5 years.

Isolated Homebodies have low levels of formal education (only 6.5% graduated from college or more), yet nearly as many Isolated Homebodies (23.8%) as Anxious Searchers (26.9%) self report as “true lifelong” learners.

Isolated Homebodies’ preferred style of learning (74.7%) is “experiencing something hands-on.”

Isolated Homebodies are laid-back, with only 7.8% reporting significant stress or strain in the past several months, and in reasonably good health, with only 27.4% reporting that their health “isn’t very good right now.”

Conclusion

Our research leads us to a broader hypothesis incorporating an expanded exercise metaphor, as follows: a key to health, happiness and longevity—indeed, to “successful aging”—is a sustained commitment to learning involving a variety of mental “exercises” blending intellectual stimulation, social engagement, physical activity, and creative expression.

Baby Boomers are on the brink of putting their own stamp on that phase of life that’s come to be called “retirement,” and they come to that brink with faith in the “lose it or lose it” proposition. Just as they revolutionized bodily exercise as they discovered (or invented) jogging, marathons, aerobics, Tae-Bo, and dozens of other novel approaches to fitness, they have an opportunity to engage in a rich, varied and balanced approach to brain exercise incorporating mental stimulation, social engagement, physical activity and creative expression. The experience of Elderhostelers and others in the preceding generation suggests that if they do they will “age successfully,” live longer, and live well.

Baby Boomers Online 2010

Pew Internet & American Life Project

(Generations 2010: <http://pewinternet.org/Reports/2010/Generations-2010.aspx>)

(Older Adults and Social Media: www.pewinternet.org/Reports/2010/Older-Adults-and-Social-Media.aspx)

Online Activities & Social Networking

Online Usage	Young Boomers (46-55)	Older Boomers (56-65)
Go online	81%	76%
Have broadband internet connection	68%	61%
Go online wirelessly	55%	46%
Online Activities		
Email	91%	93%
Use search engine	86%	87%
Look for health info	84%	85%
Get news	76%	76%
Visit a government website	73%	69%
Make travel reservations	70%	67%
Buy a product	64%	69%
Watch a video	62%	55%
Use social network sites	50%	43%
Bank online	58%	56%
Use classifieds	49%	42%
Listen to music	48%	38%
Get financial info	41%	41%
Send instant messages	35%	30%
Look for religious info	34%	33%
Rate a product, service or person	29%	40%
Read blogs	27%	25%
Play online games	26%	28%
Participate in an auction	25%	25%
Donate to charity	24%	23%
Download podcasts	20%	16%
Work on own blog	11%	11%

1. **Social networking use among internet users ages 50 and older has nearly doubled—from 22% to 42% over the past year.** While social media use has grown dramatically across all age groups, older users have been especially enthusiastic over the past year about embracing

new networking tools. Although email continues to be the primary way that older users maintain contact with friends, families, and colleagues, many users now rely on social network platforms to help manage their daily communications—sharing links, photos, videos, news, and status updates with a growing network of contacts.

2. **Half (47%) of internet users ages 50-64 and one in four (26%) users ages 65 and older now use social networking sites.** Half of online adults ages 50-64 and one in four wired seniors now count themselves among the Facebooking and LinkedIn masses. That's up from just 25% of online adults ages 50-64 and 13% of those ages 65 and older who reported social networking use one year ago in a survey conducted in April 2009. Young adult internet users ages 18-29 continue to be the heaviest users of social networking sites like Facebook and LinkedIn, with 86% saying they use the sites. However, over the past year, their growth paled in comparison with the gains made by older users. Between April 2009 and May 2010, internet users ages 50-64 who said they use a social networking site like MySpace, Facebook, or LinkedIn grew 88% and those ages 65 and older grew 100% in their adoption of the sites, compared with a growth rate of 13% for those ages 18-29.
3. **One in ten (11%) online adults ages 50-64 and one in twenty (5%) online adults ages 65 and older now say they use Twitter or another service to share updates about themselves or see updates about others.** The use of Twitter and other services to share status updates has also grown among older users—most notably among those ages 50-64. While just 5% of users ages 50-64 had used Twitter or another status update service in 2009, 11% now say they use these tools. On a typical day, 6% of online adults ages 50-64 make Twitter a part of their routine,

up from the 1% who did so in 2009. By comparison, social networking sites have gained a much larger foothold in the lives of older Americans over time. One in five (20%) adults ages 50-64 say they use social networking sites on a typical day, up from 10% one year ago. Likewise, 13% of online adults ages 65 and older log on to social networking sites, compared with just 4% who did so in 2009.

4. **Email and online news are still more appealing to older users, but social media sites attract many repeat visitors.** While email may be falling out of favor with today's teenagers, older adults still rely on it heavily as an essential tool for their daily communications. Overall, 92% of those ages 50-64 and 89% of those ages 65 and older send or read email and more than half of each group exchanges email messages on a typical day. Online news gathering also ranks highly in the daily media habits of older adults; 76% of internet users ages 50-64 get news online, and 42% do so on a typical day. Among internet users ages 65 and older, 62% look for news online and 34% do so on a typical day. Social media properties—including networking and status update sites—are newer additions to the daily digital diet of older adults. Yet, the “stickiness” of the sites is notable. To look at the data another way, among the pool of adults ages 50 and older who use social networking sites, 44% used them on the day prior to their being contacted for our survey.

Why Social Media Might Be Catching on for Older Adults

Looking at adults ages 65 and older who have high-speed internet connections at home, 72% say they use the internet on a typical day. That compares with 77% of broadband users ages 50-64, 84% of those ages 30-49, and 86% of those ages 18-29.

Social media use is somewhat more prevalent among older users who have high-speed connections at home. Among broadband users ages 50-64, 52% now use social networking sites and 24% do so on a typical day. Among adults age 65 and older who have broadband at home, 28% now use social networking sites and 15% do so on a typical day. Among many other activities, having high-

speed access has also been associated with a greater tendency to blog and share other forms of creative content online.

So why might social media be increasingly attractive to older adults?

First, our research shows that social networking users are much more likely to reconnect with people from their past, and these renewed connections can provide a powerful support network when people near retirement or embark on a new career.

In our September 2009 survey, about half of all social networking users ages 50 and older said they had been contacted by someone from their past who found them online. Overall, 64% of social networking users have searched for information about someone from their past, compared with 30% of non-users.

Second, older adults are more likely to be living with a chronic disease, and those living with these diseases are more likely to reach out for support online.

There are two activities which stand out among people living with chronic disease: blogging and participating in online health discussions. When other demographic factors are held constant, having a chronic disease significantly increases an internet user's likelihood to say they work on a blog or contribute to an online discussion, a listserv, or other forum that helps people with personal issues or health problems.

And finally, social media bridges generational gaps. While the results can sometimes be messy, these social spaces pool together users from very different parts of people's lives and provide the opportunity to share skills across generational divides.

There are few other spaces—online or offline—where tweens, teens, sandwich generation members, grandparents, friends, and neighbors regularly intersect and communicate across the same network. Photos, videos, and updates shared on a daily basis can provide a valuable connection to faraway family and friends who are tied together in a variety of ways. The children and grandchildren of older adults are documenting many aspects of their lives through social media, and these are also becoming popular spaces for professional networking, continuing education, and political participation.



Learning in the Third Chapter of Life

Book excerpt from: *The Third Chapter: Passion, Risk, and Adventure in the 25 Years After 50*

Sara Lawrence-Lightfoot

The journey of learning in the Third Chapter crosses borders and covers landscapes that are rich with complexity and color. The geography is rocky and irregular, beautiful and tortured, full of hills and valleys, open vistas and blind alleys, and menaced by minefields. The path moves forward and circles back, progresses and regresses, is both constant and changing. The developmental terrain grows more layered; patience trumps speed; restraint trumps ambition; wisdom trumps IQ; “leaving a legacy” trumps “making our mark;” and a bit of humor saves us all. Earlier narratives framed the internal and external landscapes of our learning and the trajectories of our development; now we move to consider the actual processes involved in new learning—the interior, detailed picture of people actually engaged in learning. How do women and men in their Third Chapters find ways of changing, adapting, mastering, and channeling their energies, skills, and passions into new domains of learning? How do they experience vulnerability and uncertainty, learn from experience and failure, seek guidance and mentoring, join work and play, rigor and spontaneity, and develop new relationships of mentoring and support? As I listened to people’s accounts of risk-taking and adventure in the Third Chapter, I was particularly intrigued by their processes of learning in three domains that I have named: body, voice, and soul.

There is a “different kind of knowing” that many people found almost impossible to describe in words—a knowing that resides in the body, in the hands, fingers, and posture of a jazz pianist, in the unconscious dream life of a painter, in the shifts “from left to right brain” in the craft of a furniture maker. This kind of knowing is confused and compromised by the mind’s surveillance. Other interviewees talked about the empowering feeling of “discovering their voice”—a phrase they used both literally and metaphorically. Those who referred to it in the literal sense told stories about taking voice lessons, learning how to speak another language, and finding the courage to do public speaking. Those who used the phrase metaphorically, talked about discovering within themselves a newfound sense of authority and courage, of becoming truth tellers. Still others spoke about “becoming a different person” in their Third Chapter, a learning process that

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This book excerpt is taken from Chapter 6 in her latest book, *The Third Chapter: Passion, Risk, and Adventure in the 25 Years After 50* (Sarah Crichton Books, 2009). Used by permission.

involved the depths of their souls, a reconstruction and reorientation of their identity, their values, and their priorities. A businesswoman described the shift of focus in her life from “the external to the internal terrain;” an African American museum administrator and curator recalled the deepening of her racial identity and a “commitment” to her “ancestral legacies;” and an internationally renowned jazz musician claimed the full acceptance of his gay identity. “I used to say that I was a jazz musician who happened to be gay. Now I tell people I am a gay person who happens to be a jazz musician,” he said without defensiveness.

I found these domains of new learning particularly intriguing for three reasons.

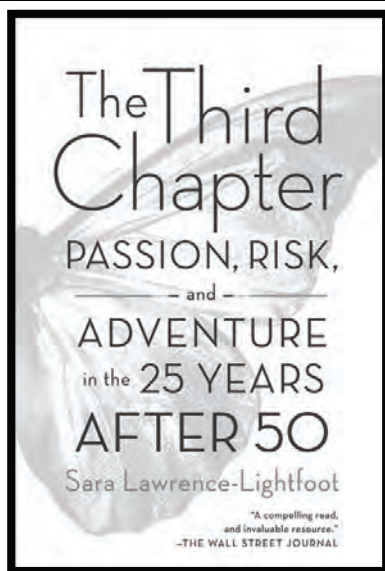
First, because, as men and women talked about their learning, their stories were threaded through with a palpable yearning, deeply felt emotions, and what one interviewee called an “unfamiliar inarticulateness.” In telling their experiences of gaining mastery, people searched for words to express the “rush of inchoate feelings.” They would have to “show” me, rather than “tell” me, what they were learning—a painstaking demonstration of “fumbling mastery.” Words were rarely enough to convey their feelings about “the interior and exterior chaos” that they experienced before making a “small, barely noticeable breakthrough” in their learning.

Second, the learning in all three of these realms seemed to require that people challenge their deeply imprinted cultural priorities and assumptions that had formerly dominated their lives and often

defined their success. Said a woman film director, who was trying to change the “pace and rhythm” of her life, “My parents always pushed speed and competition—being fast, being first, being best—all very American ways of being. Now I’m trying to learn to slow down and go deeper. I want to live in the present, rather than spend all of my time anticipating—and fearing—the future.” And many others told stories of seeking new ways of learning and living that cut against the grain of traditional definitions of achievement, success, and mastery that are typically reinforced in our society. Their new learning often felt like an “act of resistance.”

Third, I was particularly fascinated by these domains of learning because of how they contrast with the relatively narrow cognitive learning that goes on inside classrooms, how they depart from the standards and measures of achievement that are central preoccupations of educational practitioners and policy makers. As a matter of fact, people often spoke of having to unlearn styles of learning—ways of processing information, and expectations of reward and reinforcement—that had worked for them in school but now felt inhibiting and counterproductive.

In each of the three realms of learning—body, voice, and soul—that I explore, women and men resist former habits of mind, styles of approach, and sources of identity that may have worked for them in the past, and substitute for them others that open up new pathways of energy, expression, productivity, and pleasure.



The Third Chapter: Passion, Risk, and Adventure in the 25 Years After 50

Sara Lawrence-Lightfoot. (New York: Sarah Crichton Books, 2009) [\$25]

Sara Lawrence-Lightfoot writes, “We must develop a compelling vision of later life: one that does not assume a trajectory of decline after fifty, but one that recognizes it as a time of change, growth, and new learning; a time when ‘our courage gives us hope.’” Whether by choice or not, many in their “third chapters” are finding ways to adapt, explore, and channel their energies, skills, and passions in new ways and into new areas. Sara Lawrence-Lightfoot documents and reveals how the years between fifty and seventy-five may, in fact, be the most transformative and generative time in our lives, tracing the ways in which wisdom, experience, and new learning inspire individual growth and cultural transformation. *The Third Chapter* is full of passionate and poignant stories of risk and vulnerability, failure and resilience, challenge and mastery, experimentation and improvisation, and insight and new learning.



A Spirituality for the Two Halves of Life

Book excerpt from: *Falling Upward: A Spirituality for the Two Halves of Life*

Richard Rohr, OFM

There are two major tasks in the human spiritual journey. The task of the first half of life is to create a proper container for one's life and answer some central questions. "Who am I?" "What makes me significant?" "How can I support myself?" "Who will go with me?" The task of the second half of life is, quite simply, to find the actual contents that this container was meant to hold and deliver. In other words, the container is for the sake of the contents.

Problematically, the first task invests so much of our blood and sweat, eggs and sperm, tears and years that we often cannot imagine there is a second task, or that anything more could be expected of us. The old wineskins are good enough, we say, even though according to Jesus they often cannot hold the new wine. According to him, if we do not get some new wineskins "both the wine and the wineskin will then be lost" (Luke 5:37). The second half of life can hold some new wine because by then there should be some new wineskins. But that means, of course, that the container itself has to stretch, die in its present form, or even replace itself with something better. This is the full rub, but also our mid-life excitement and discovery.

Almost all of culture, and even most of religious history, has been invested in the creation and maintenance of first half of life issues: the big three concerns of identity, security, and survival. They don't just dominate, they totally take over. That is where history has been up to now, I am afraid. In fact, most generations have seen boundary marking and protecting those boundaries as their primary and sometimes only task. Most of history has been the forging of structures of security and appropriate loyalty symbols to announce and defend one's personal identity and one's group. We were both overly defensive and overly offensive it seems, with little time left for simple living, friendship, or communion. Yet that kind of ego structure is exactly what a child needs to get through the first eighteen years or so, and what tribes need to survive. Maybe it is what history needed to get us all started. "Good fences make good neighbors," Robert Frost said, but that presumes you don't just build fences. You eventually need to cross them too.

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This book excerpt is taken from his newest book, *Falling Upward: A Spirituality for the Two Halves of Life* (Jossey-Bass, 2011). Used by permission.

We need boundaries, identity, safety, and some degree of order and consistency to get started personally and culturally. We also need to feel “special”; we need our “narcissistic fix!” By that I mean, we all need some successes, response, and positive feedback early in life, or we will spend the rest of our lives demanding it from others. There is a good and needed “narcissism,” if you want to call it that. You have to first have an ego structure to then let go of it and move beyond it.

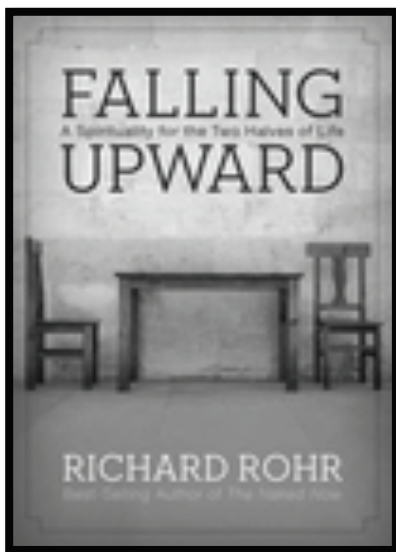
Basically if you get mirrored well, early in life, you do not have to spend the rest of your life looking in Narcissus’ mirror, or begging for the attention of others. You have already been basically “attended to” and now it just feels good—and always will. If you were properly mirrored when you were young, you are now free to mirror others and even yourself—honestly and helpfully. I can see why a number of saints spoke of prayer itself as simply receiving the ever accepting gaze of God, returning it, mutual gazing, and finally recognizing it is one single gaze received and bounced back. The Hindus call it darshan.

Once you have your narcissistic fix you have no real need to protect your identity, defend it, prove it, or assert it. It just is, and is more than enough. This is what we actually mean by “salvation,” especially when we get our narcissistic fix all the way from the Top. When you get your “who” right, all of the “whats” tend to take care of themselves. The very fact that so many religious people have to vigorously prove their salvation theories makes one seriously

doubt whether they have experienced divine election at any depth.

In the first half of life, success, security, and containment are almost the only questions. They are the early stages in Maslow’s “hierarchy of needs.” We all want and need various certitudes, constants, and insurance policies at every stage of life. But we have to be careful, or they totally take over, and become the only task, keeping us from further growth. Thus the most common one liner in the Bible is “Do not be afraid.” If we do not move beyond our early motivations of personal security, reproduction, and survival (“the lizard brain”), we will never proceed beyond the lower stages of human or spiritual development. Many sermons I have heard my whole life seem to assume this level of development, and do not seriously challenge it.

The very unfortunate result of this preoccupation with order, control, safety, pleasure, and certitude is that a high percentage of people never get to the contents—of their own lives! Human life must be about more than building boundaries, protecting identities, creating tribes, and teaching impulse control. As Jesus said, “Why do you ask, what am I to eat? What am I to wear?” And to that he says, “Is life not so much more than food? Is life not so much more than clothing?” (Luke 12:23). “What will it profit you if you gain the whole world, and lose your very soul?” (Matthew 16:26).



Falling Upward: A Spirituality for the Two Halves of Life

Richard Rohr, OFM. (Jossey-Bass, 2011) [\$19.95]

In *Falling Upward*, Fr. Richard Rohr seeks to help readers understand the tasks of the two halves of life and to show them that those who have fallen, failed, or “gone down” are the only ones who understand “up.” Most of us tend to think of the second half of life as largely about getting old, dealing with health issues, and letting go of life, but the whole thesis of this book is exactly the opposite. What looks like falling down can largely be experienced as “falling upward.” In fact, it is not a loss but somehow actually a gain, as we have all seen with elders who have come to their fullness. He explains why the second half of life can and should be full of spiritual richness, and offers a new view of how spiritual growth happens. This important book explores the counterintuitive message that we grow spiritually much more by doing wrong than by doing right.



Developing Faith Formation for the Baby Boom Generation

John Roberto

Are churches reading for the coming tsunami of aging Baby Boomers. In 2011 the first members of the Baby Boomer Generation turn sixty-five years old. In the United States today Americans over sixty-five now outnumber teenagers by nearly two to one. What used to be referred to as the “graying of America” is now understood to be a social revolution. Some thirty-nine million Americans, or 13% of the U.S. population, are ages sixty-five and older—up from 4% in 1900. By 2050, according to Pew Research projections, about *one-in-five* Americans will be over age sixty-five, and about 5% will be ages eighty-five and older, up from 2% now. Nearly every industry in society, from health care to entertainment, is scrambling to respond to this age wave that is crashing on our shores.

America is in the midst of a demographic revolution, but this revolution is about much more than longevity. It’s about the changing perspective of the Baby Boomers as they reach what was traditionally viewed as a time to enjoy the golden years. We are witnessing the emergence of a new stage of life between adult midlife—typically focused on career and child-rearing—and old age, traditionally marked by increasing frailty and decline. This new stage of life spans several decades and is characterized by generally good health, relative financial stability, and an active, engaged lifestyle.

Phyllis Moen, in her article “Midcourse: Navigating Retirement and a New Life Stage” writes, “[This is] the period in which individuals begin to think about, plan for, and actually disengage from their primary career occupations and the raising of children; develop new identities and new ways to be productively engaged; establish new patterns of relating to spouses, children, siblings, parents, friends; leave some existing relationships and begin new ones. As in adolescence, people in the midcourse years are thinking about and enacting role shifts that are both products of their past and precursors of their future life course.”

This article is organized into two sections. Part 1 offers insights on approaching faith formation with Baby Boomers from experts in the field. Part 2 is a guide to developing congregational faith formation with Baby Boomers, that utilizes the process I developed in my Fall 2009 (Volume 3.3) *Lifelong Faith* article, “Faith Formation for Every Adult in Your Church—It’s Possible Today!”

John Roberto is the editor of *Lifelong Faith* and the author of the new book, *Faith Formation 2020: Designing the Future of Faith Formation* (LifelongFaith Associates).

Part One. Approaching Faith Formation with Baby Boomers

1. Perspectives & Practices for Ministry with Baby Boomers - Gary McIntosh

(Excerpts from: "Trends and Challenges for Ministry Among North American's Largest Generation." *Christian Education Journal*, Series 3, Vol. 5, No. 2, pages 300-303; <http://wisdom.biola.edu/cej>)

Gary McIntosh describes the Baby Boomer generation as educated, media-oriented, independent, cause-oriented, fitness conscious, activists, quality conscious, and questioning of authority. He says that as church members Boomers are (1) committed to relationships, rather than organizations; (2) want to belong, rather than join; (3) supportive of people, rather than programs; (4) long to live their faith, rather than talk about it; (5) wish to be seen as unique individuals, rather than a monolithic group; (6) desire to design their own programs, rather than attend ones developed for them; (7) yearn to serve others, rather than only being served; and (8) crave meaningful activity, rather than empty days. In this excerpt he describes how to approach faith formation with Baby Boomers.

Perspectives

I have followed the boomer generation since 1983, tracking the impact of their lifestyle, attitudes, and interests on general church ministry. Like others, I have noticed that Boomers have always made their own rules, and now they are redefining how to grow old. As Boomers reinvent old age, gerontologist Ken Dychwald says they "will age rebelliously." And, as Boomers push the age profile of churches in the United States higher, they are also demanding a different array of services than the same age group a generation ago. My observations lead me to conclude the following regarding aging Boomers.

First as Boomers age they continue to be different than the generation preceding them.

Generational personality does not change much after the bulk of the generation reaches 30 years old, and Boomers are not likely to suddenly wake up and like older forms of ministry. Expect Boomers to ask why, tell it like it is, let it all hang out, prefer informal activities, like change and variety, think the system is the problem, be cause-oriented, desire to experience life, and have a low view of institutions. In short, expect Boomers to act and think much like they always have, except with more maturity.

Second, as Boomers age, they are offended by "old" stereotypes. They like to be characterized by the following words: active, alert, contributor, experienced, healthy, independent, and worker. Most Boomers think of themselves as 10-15 years younger than they actually are. They dislike being labeled "senior citizens," "old," or "retired." In short, expect Boomers to be turned off by any ministry that portrays them as frail, aged, or sedentary.

Third, as Boomers age they aspire to be unique individuals. They want to be part of the decision-making for any ministry that they are expected to attend and will not respond to a program that is developed for them without their input. They resist the "poor dear syndrome" and senior discounts. In their way of thinking, a 10% discount means they are 10% depreciated. Boomers never wished to wear fashions that made them look mature, and they continue to appreciate the music of their youth. Any church ministry that is designed for their parents will not attract aging Boomers. They are attracted to ministries that help them look back with pride to their youth, while helping them launch the next chapter in their lives. To be successful, ministry to Boomers must appear youthful, healthy, vibrant, and worthy of their time and energy.

Fourth, as Boomers age they continue to search for the next new adventure. Whether it is short-term mission trips or ski outings, older boomer still look for new experiences. Most recently, they have made sports utility vehicles extremely popular. It is true that they rarely drive them off the road, but they have an adventure from their driveway to the grocery store and back. In short, they are attracted to church ministry that is challenging and adventuresome.

Fifth, as Boomers age, they continue to accelerate their careers. Boomers are changing their lifestyles but staying involved in the work force. They are buying vacation and second homes, as well

as enlarging their nests to include home offices and fitness centers. While churches continue to offer noontime luncheon meetings for seniors, working Boomers cannot come due to their jobs. In a word, aging Boomers are attracted to ministries that are high quality and make allowances for their work schedules.

Sixth, as Boomers age, they continue to search for spiritual meaning. While Boomers have always demonstrated a “spiritual” bent, whether in a mystical or a traditional religious sense, throughout most of their lives many Boomers have simply ignored the church. However, it is now apparent that age Boomers struggle with the same spiritual, emotional, and life-stage issues with which previous generations have wrestled. All the instincts of the baby Boomers are saying, “Slow down. Figure out what’s important.” They are attracted to church ministries that speak clearly and specifically to their concerns, and ones that make a difference in their lives.

Seventh, as Boomers age, they continue to break the rules. Boomers have always challenged the status quo, and they are doing so as they reinvent themselves today. Aging Boomers will need room to re-frame traditional seniors’ ministry to fit their own needs and desires.

Practices

As church leaders think through the challenges and opportunities present by the aging boomer generation, I believe they should consider trying to do the following:

1. Build a ministry for Boomers that is **adventurous**. Rather than mall walking, consider hiking in the mountains, cross-country skiing, or snowshoeing. Remember: Boomers have always seen themselves as a youthful generation, and they still do!
2. Build a ministry for Boomers that is **fun**. Rather than potluck luncheons, consider catered parties, fishing trips, paint ball competitions, and team-building camps. Remember: Boomers are not looking for a seniors’ ministry; they are seeking an older youth ministry.
3. Build a ministry for Boomers that is **significant**. Rather than being served,

consider serving others by building a home for Habitat for Humanity, assisting missionaries, helping out-of-work people to find a job, or tutoring children. Remember: Boomers desire to make a difference in the world by taking on great causes.

4. Build a ministry for Boomers that is **educational**. Along with Bible studies, consider CPR, basic first aid, personal health, managing finances, and public speaking classes. Remember: Boomers are an educated generation, and they wish to continue learning to the end of their days.
5. Building a ministry for Boomers that is **spiritual**. Rather than offering simplistic formulas, consider prayer walks in the neighborhood, intercession teams, and a variety of small group sharing. Remember: Boomers are a mosaic of sub-groups, and it will take a multi-dimensional approach to spiritual formation to reach them.

There are three approaches we can take with aging Boomers. One, we can simply write off Boomers and focus on the emerging generations. Two, we can try to reach and keep Boomers with ministries that currently exist and are popular with the oldest generation. Or, three, we can scrap our conventional thinking about seniors’ ministry and start from scratch, building a new ministry that is fruitful in reaching and keeping aging Boomers. For churches that desire to be fruitful, my advice is to choose the third option.

Ministry By and For Those Beyond the Age of 55

Christian Education Journal
Series 3, Volume 5, No. 2, Fall 2008 [\$15]
(Biola University, <http://wisdom.biola.edu/cej>)

The Fall 2008 issue of Christian Education Journal focuses on older adults (55+) with a series of excellent articles, including “Perspectives on the Spiritual Development of ‘Aging’ Boomers” by Hal Pettegrew, and “Trends and Challenges for Ministry Among North America’s Largest Generation” by Gary McIntosh. Purchase this back issue, or individual articles, from the Biola University website.

2. Three Components of Ministry with Baby Boomers - Amy Hanson

(Excerpts from *Baby Boomers and Beyond: Tapping the Ministry Talents and Passions of Adults Over Fifty*. San Francisco: Jossey Bass, 2010.)

Amy Hanson, in *Baby Boomers and Beyond*, proposes three essential components for creative ministries with maximum impact on Baby Boomers: 1) service, 2) spiritual growth, and 3) intergenerational relationships.

Service

Boomers want to do something interesting and challenging. They are ready to jump into a worthwhile cause where they feel that can make a significant difference. Boomers want service opportunities that have a mission. They want to do things that give their lives purpose, meaning, and fulfillment. They want to know their contributions truly matter. There is no greater mission for Boomers to immerse themselves in than the mission of Christ to redeem and heal a broken world. Encourage Boomers to serve in an area where they've always had an interest, and provide them with exposure to a variety of service opportunities. Short term trips can be a great way for people over fifty to discover the one thing they want to invest themselves in. Show Boomers how they might use their past work experiences as tools for service. Help them tap into their passion.

Engaging Boomers to make a major impact for Christ in the world should be a primary foundation for ministry with Boomers—if not *the* primary foundation. We have an open window of time right now to help individuals refocus their priorities and recognize how God wants to use them for his purposes in this season of their lives. (Hanson, 143)

Spiritual Growth

There are several fundamental resources why Boomers are responsive to the message of the gospel and to spiritual growth. Later Adulthood is a season of significant life transitions and people are more responsive to religion. A second reason is Boomers quest to find meaning and purpose in life as they

enter the second half of life and evaluate the things that really provide lasting fulfillment. A third reason adults are open to faith and spiritual growth is their desire for meaningful relationships. The church can be a primary place of social interaction where people can connect with one another and talk about life issues. “All three factors—help dealing with life’s changes, a search for purpose, and a desire for meaningful relationships—can powerfully work together in drawing adults to Christ’s saving grace. (Hanson, 151)

Effective ways to bring older adults into a relationship with Christ include: (1) small group faith formation, (2) hanging out in the places where Boomer adults gather, (3) hosting events that appeal to Boomer’s interests and needs, and (4) service opportunities.

Intergenerational Relationships

Ministry with Baby Boomers includes an intergenerational component. Developing intergenerational relationships is one of the best ways to break age-related stereotypes, to share faith across generations, and to help the church become more unified. There are a variety of ways to connect the generations and develop intergenerational relationships: (1) encourage generations to serve together on a worthy cause; (2) form groups according to similar interests rather than age; (3) encourage adults to intentionally pray for young people and vice versa; (4) host strategic intergenerational events that are fun for all, have ready-made questions that permit age groups to engage easily in conversation, and encourage relationships to continue after the event is over; (5) ask adults to tell their stories, at workshop or events or programs, and capture them on video and/or in print; (6) develop intergenerational small group and large group programming; (7) integrate all ages in Sunday worship; and (8) educate people as to the uniqueness of each generation.

As multiple generations work, worship, serve, and play together, the result will be that people lay down their own self-centeredness and take up the attitude of Christ. True, we may have to do church a little differently, but when all ages are regularly interacting and loving one another, God is honored, and we become an example to our hurting world. (Hanson, 185)

3. Keys to Baby Boomer Faith Formation: Variety & Choice

We know from research that adult learners will chose the learning activity that best fits their learning needs, preferred modes of learning, and time constraints. In order to accomplish this, faith formation with Baby Boomers needs to provide a variety of content and learning activities, and a variety of models for faith formation that include activities in physical places and virtual spaces.

A Variety of Models

Six models that should be part of adult faith formation offerings for Baby Boomers include:

1. **Faith Formation on Your Own:** through reading, online courses, audio and video programs, movies, television programs
2. **Faith Formation at Home:** through Bible reading, storytelling and caring conversation, prayer and devotions, rituals and traditions, service
3. **Faith Formation in Small Groups:** through Bible and theology study groups, social issues study groups, faith sharing groups, lectionary-based groups, service/mission action groups, support groups, special interest groups
4. **Faith Formation in Large Groups;** through courses, speaker series, workshops, film festivals, retreats, conferences, intergenerational programs
5. **Faith Formation in the Congregation:** through Sunday worship, church year events and celebrations, service/mission activities, ministry and leadership in the church and community
6. **Faith Formation in the Community and World:** through programs, courses, clinics, workshops, and presentations at universities, retreat centers, YMCAs, libraries, bookstores, regional church programs; through engagement in community/political action, local and global service and justice projects

A Variety of Settings: Face-to-Face & Online

Adult faith formation includes learning activities in physical places and virtual spaces, blending face-to-face, interactive learning with virtual, online learning. Online websites, social networking services, and digital technologies (e.g., an iPod Touch, smart cell phones) mean that churches can deliver faith formation experiences and resources anytime and anywhere, reaching people wherever they go online (home, work, school, vacation, coffee house). The interplay between learning in physical places, face-to-face, and virtual online spaces can revolutionize adult faith formation in a church.

Suggestions & Ideas for Baby Boomer Faith Formation

1. Develop a Lifelong Learning Institute at your church or as a collaborative effort among churches in your community.

Baby Boomers are looking for stimulating learning experiences that run the gamut of topics and interests. Imagine your church (or a group of local churches) as a “college” where courses and learning events are offered throughout the week—daytime, evenings, weekends—on campus and out in the community/world.

The Osher Lifelong Learning Institutes can serve as a model for establishing an institute for adults 50 or older. Osher Institutes are found on the campuses of 118 colleges and universities from Maine to Hawaii and Alaska. Each provides a distinctive array of non-credit courses and activities specifically developed for adults aged 50 or older who are interested in learning for the joy of learning.

For example the University of Dayton Osher Institute offers courses in art, current events, health and fitness, history, literature, music, religion and science. A curriculum committee selects courses on the basis of member requests, the expertise of moderators, variety, and balance. Moderators include University of Dayton professors and community professionals who lead peer-to-peer informal discussion seminars that meet once a week for two hours, for four to eight weeks. The summer session is two one-day sessions. At Duke University

the Osher Institute utilizes a mix of peer teachers, Duke professors, graduate students, independent scholars, and community experts.

Your church(s) can develop courses and learning activities around the interests of Baby Boomers, as well as around the expertise of teachers/leaders in your church and community. Topics which emerged from the survey of research in this journal issue included:

- personal finances and financial security,
- physical health and exercise
- personal interests (e.g., hobbies, dance, writing, arts)
- travel and new adventures
- family relationships and responsibilities (e.g., caring for an older parent),
- spiritual health (meaning and purpose in life, deepening and strengthening relationship with God)
- changing living situations
- multiple life transitions

Courses at the Duke University Osher Lifelong Learning Institute cover a wide range of topics and interests: art and architecture, hands-on art, computer programs, culture and social sciences, economic/financial issues and retirement issues, health and wellness, history and current affairs, literature, language and drama, natural science and technology, performing arts, religion and philosophy, and writing.

Ginghamsburg Church in Tipp City, OH takes a similar “institute” approach, offering courses and learning activities throughout the week on a wide variety of topics and interests. The Winter/Spring 2011 courses include: Encountering the God of Abraham, Isaac, and Jacob; A Study of David: Anointed, Transformed, Redeemed; Crown Financial Study and Financial Peace University; Secrets of a Prayer Warrior; A Follower’s Life; Boundaries (relationship course); Forgive for Good; Ministry by Strengths; Love is a Choice: Letting Go of Unhealthy Relationships; C.L.A.R.I.T.Y. in Communications; Christian 12-Step; GriefShare; Zumba with Toning; Insanely Fit; Healthy Cooking Class; Yoga Café; Yoga/Pilates Fusion; Quilting Group; and Basic Car Maintenance.

For More Resources and Examples

- Osher Lifelong Learning Institute: <http://usm.maine.edu/olli/national>

- Aquinas College: www.aquinas.edu/olli
- Duke University: www.learnmore.duke.edu/olli
- Ginghamsburg Adult Faith Formation: <http://ginghamsburg.org/adult>
- Santa Clara University: www.scu.edu/osher
- University of Dayton: <http://artssciences2.udayton.edu/continuingeducation/udlli.asp>

2. Utilize online resources to develop programs and activities in a variety of faith formation models.

Online learning resources continue to increase dramatically. Many of these resources are free and can be used in a variety of faith formation models: on your own, at home, in small groups, and in large groups. Here are two examples of the rich resources online.

Ted Talks

TED is a small nonprofit devoted to Ideas Worth Spreading. It started out (in 1984) as a conference bringing together people from three worlds: Technology, Entertainment, Design. Since then its scope has become ever broader. The annual TED conferences bring together the world’s most fascinating thinkers and doers, who are challenged to give the talk of their lives (in 18 minutes). The TED website has been developed around TEDTalks, with the goal of giving everyone on-demand access to the world’s most inspiring voices. There are more than 700 TEDTalks now available.

Website: www.ted.com/index.php/talks

iTunes University

iTunes University, part of the iTunes Store, is possibly the world’s greatest collection of free educational media available to lifelong learners. With more than 350,000 free lectures, videos, films, and other resources—from all over the world, iTunes U has become the engine for the mobile learning movement. Almost 400 universities—including Stanford, Yale, MIT, Oxford, and UC Berkeley—distribute their content publicly on the iTunes Store. In the Beyond Campus section of iTunes U, people can access a wealth of content from distinguished entities such as MoMA, the New York Public Library, Public Radio International, and PBS stations.

Website: www.apple.com/education/itunes-u

3. Offer a variety of justice and service involvements for Baby Boomers.

Churches can respond to Boomers' interest (and increasing time availability) to address social issues and their willingness to make their community and world a better place by offering a variety of age-specific and intergenerational projects that are geared to different levels of involvement and challenge, such as:

- local mission projects lasting anywhere from a few hours to one day in length
- short-term mission trips lasting anywhere from two to five days and requiring an overnight stay on location
- weeklong mission trips within the United States as well as to foreign countries, designed for those who are ready to take the next big step in service
- global expedition trips of ten to fourteen days that provide the opportunity to be immersed for a longer period in the targeted community and culture
- personalized small group mission trips, organized around the interests and time of the group

Utilize existing projects and organizations—locally, nationally, and globally—to offer a variety of involvements. Develop an annual “catalog” of service/mission opportunities. For an example of this approach go to Ginghamburg Church Adult Global Missions: <http://ginghamsburg.org/missions>.

Churches can also develop small groups that combine the study of justice and social issues with experiential hands-on action projects. Groups can be organized around issues or themes. One example of a small group program that weaves study, small group learning, retreat experiences, and action projects is *JustFaith* (www.justfaith.org). *JustFaith* is a thirty-week justice formation and transformation process that focuses on discipleship—engagement in the life of Jesus—and the call to be about God's dream of justice and compassion in a world scarred by the domestic and global crisis called poverty. Meeting weekly, small groups of 10–15 people employ books, videos, discussion, prayer, retreats and hands-on experiences. Opening and closing retreats are part of the commitment each participant makes to the group. Four immersion experiences provide face-to-face contact with people living on

the margins of society, and include social analysis and spiritual/theological reflection.

4. Develop faith formation around Baby Boomer milestones and life transitions.

Faith formation with Baby Boomers (adults currently in their 50s and 60s) can be developed around their many life transitions or “trigger events” as Richard Leider calls them (see the “Discovering What Really Matters” article in the survey of research reports for more information.) The most significant life transitions in the 50s and 60s include:

- starting a new job
- losing a job
- child beginning college
- child graduating from college
- adult child moving back home
- child getting married
- birth or adoption of a grandchild
- caregiving for a grandchild
- surviving a major illness/accident
- death of someone close
- caregiving for an elderly relative
- retirement
- selling the “family home”
- relocating to a new home

Churches can develop faith formation around these significant life transitions or milestones by creating:

1. a ritual celebration or a blessing marking the milestone with the whole church community
2. a home ritual celebration or blessing marking the milestone
3. a learning program—often for the whole family or community—that prepares the individual for the milestone
4. a tangible, visible reminder or symbol of the milestone being marked
5. resources for pastoral care and for continuing faith growth after the milestone experience

Resources

Hater, Robert. *Journeys of Discovering*. New London: Twenty-Third Publications, 2009.
Milestones Ministry Manual for Home and Congregation. Bloomington: Vibrant Faith Ministries, 2007. (www.vibrantfaith.org)

5. Develop spiritual formation focused on “spirituality for the second half of life.”

As Baby Boomers enter the second half of life, churches can respond by helping them explore spirituality from a new perspective. A resource such as Richard Rohr’s *Falling Upward: A Spirituality for the Two Halves of Life* (Jossey-Bass, 2011) can provide content for a variety of programs and activities, including a course, a retreat program, small group study, etc.

Churches can respond to the hunger for growing in relationship and intimacy with God and exploring more deeply the life of the Spirit by providing formation in spiritual disciplines and practices for the second half of life. Churches can offer educational programs, retreat experiences, spiritual guides who serve as mentors on the spiritual journey, and resources on the spiritual disciplines and practices. Churches can also equip Baby Boomers to serve as spiritual mentors and guides for other ages.

Churches can assist Baby Boomers in (re)discovering and experiencing spiritual practices such as Lectio Divina, Scripture reflection, spiritual reading, contemplation, fixed-hour prayer, the examen, solitude and silence, Sabbath, praying with art and music, discernment, fasting, and prayer styles and traditions.

Spiritual formation in small groups provides a flexible way to explore and experience the spiritual practices and disciplines, and apply them to daily life. Offer small groups in a variety settings (church, home, coffee shop), times, and lengths suited to people’s lifestyles. Offer a variety of content topics such as “Spiritual Disciplines Bible Study Groups” focused on the core spiritual practices in the Bible (see *Spiritual Disciplines Companion: Bible Studies and Practices to Transform Your Soul* by Jan Johnson); and small groups focused on a single spiritual practice, such as Sabbath, prayer, contemplation, fasting, Scripture reflection, pilgrimage, discernment, and liturgical year.

Set aside a prayer room stocked with resources about prayer and spiritual practices and connect people to online spiritual formation and prayer resources, as well as to online communities that nurture spiritual formation.

A Sampling of Spiritual Formation Resources

Ancient Christian Practices Series (Thomas Nelson)

- Allender, Dan. *Sabbath*.
- Benson, Robert. *In Constant Prayer*
- Chittister, Joan. *The Liturgical Year*.
- Gallagher, Nora. *The Sacred Meal*.
- McLaren, Brian. *Finding Our Way Again: The Return of the Ancient Practices*.
- McKnight, Scott. *Fasting*.

Barton, Ruth Haley. *Sacred Rhythm: Arranging Our Lives for Spiritual Transformation*. Downers Grove: Intervarsity, 2006.

Calhoun, Adele Ahlberg. *Spiritual Disciplines Handbook: Practices that Transform Us*. Downers Grove: Intervarsity, 2005.

Caliguire, Mindy. *Discovering Soul Care, Spiritual Friendship, Simplicity, and Soul Searching*. Downers Grove: Intervarsity, 2007-2008.

Dawson, Gerrit Scott, Adele J. González, E. Glenn Hinson, Rueben P. Job, Marjorie J. Thompson, and Wendy M. Wright. *Companions in Christ: A Small-Group Experience in Spiritual Formation*. Revised Edition. Nashville: Upper Room, 2006.

Foster, Richard. *Life with God: Reading the Bible for Spiritual Transformation*. San Francisco: HarperOne, 2008.

Foster, Richard. *Celebration of Discipline: The Path to Spiritual Growth*. 20th Anniversary Issue. San Francisco: HarperCollins, 1998.

Johnson, Jan. *Spiritual Disciplines Companion: Bible Studies and Practices to Transform Your Soul*. Downers Grove: Intervarsity, 2009.

Redmont, Jane. *When in Doubt, Sing: Prayer in Daily Life*. Jane Redmont. Notre Dame: Sorin, 2008.

Rhodes, Tricia McCary. *Sacred Chaos: Spiritual Disciplines for the Life You Have*. Downers Grove: Intervarsity, 2008.

Rupp, Joyce. *Prayer*. Joyce Rupp. Maryknoll: Orbis, 2007.

Thompson, Marjorie. *Soul Feast: An Invitation to the Christian Spiritual Life*. Westminster/John Knox, 2005.

Wicks, Robert. *Prayerfulness: Awakening to the Fullness of Life*. Notre Dame: Sorin, 2009.

Wolpert, Daniel. *Creating a Life with God: The Call of Ancient Prayer Practices*. Nashville: Upper Room, 2003.

5. Connect Baby Boomers with the other generations in the congregation through intergenerational events, programs, and relationships.

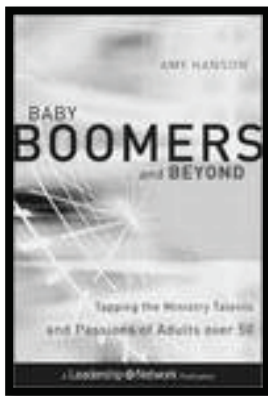
Churches can connect Baby Boomers to other generations in a variety of ways. Here are several suggestions.

- Offer simple, one-time opportunities for Baby Boomers and the younger generations to get to know each other: social events, service projects, or educational experiences. Make a concerted effort to invite people from all generations to plan and participate in the activities.
- Encourage Boomers to share their faith journey, beliefs, and values with young people. Invite young people to share their stories, too.
- Link people of different generations (older-to-younger or younger-to-older) in the church who have insights and life experiences that may be helpful to the other, such as Boomers helping young adults and new parents with money management and household management, or young people helping Boomers navigate the online world.
- Structure age-group programs with an intergenerational connection, such as an educational program that includes interviews, a

panel, and/or storytelling with people of different ages.

- Incorporate intergenerational dialogues into programming—opportunities for the generations to experience the wisdom, faith, and interests of other generations through presentations, performances, and discussions.
- Develop mentoring relationships between youth and Baby Boomers, such as prayer partners, learning-to-pray spiritual direction, service involvement, and Confirmation mentors.
- Design intergenerational service programs (or redesign existing programs) that accommodate the needs and interests of all generations.
- Sponsor music and art projects such as a community concert where musicians of all ages perform together, or an intergenerational art exchange or exhibit, or an Advent or Lent music festival.
- Organize social-recreational activities, such as an intergenerational Olympics or a Wednesday night simple meal and Bible study during Lent.
- Offer intergenerational learning programs throughout the year that involve all generations in learning, relationships building, faith sharing, prayer and celebrating.

(For more insights and ideas about connecting the generations see the Spring 2009 (Volume 3.1) issue of *Lifelong Faith*—“Generations Learning Together.”



Baby Boomers and Beyond: Tapping the Ministry Talents and Passions of Adults over 50

Amy Hanson. (San Francisco: Jossey-Bass, 2010) [\$24.95]

With more discretionary time and increased longevity, Baby Boomers are searching for a way to make a meaningful impact with their lives. *Baby Boomers and Beyond* explores the opportunities and challenges that the older adult population presents for the Christian community. Amy Hanson dares church leaders to let go of stereotypes about aging and embrace a new paradigm, that older adults are for the most part active, healthy, and capable of making significant contributions for the Kingdom of God. Hanson offers a realistic view of the Boomers and reveals what matters most to this age group: staying young, juggling multiple relationships, and redefining retirement. By tapping into their needs, pastors can engage this burgeoning group and unleash the power of the Boomer generation to enhance and strengthen the mission of the church. The book address questions such as: How do we let go of "one-size-fits-all" ministry? What spiritual growth can we encourage? How do we meld multiple generations? And, most important, how do we harness the potential of this new generation? There are numerous examples from churches across the country.

Part Two. A Guide to Developing Faith Formation with Baby Boomers

(Note: This process is adapted from “Faith Formation for Every Adult in Your Church—It’s Possible Today!” by John Roberto in *Lifelong Faith* Volume 3.3, Fall 2009.)

Addressing the Diversity of Baby Boomers

As we have seen in the survey of research reports, there is a great diversity of experiences, concerns, and spiritual and religious needs among Baby Boomers. To address this diversity, churches need to offer a wide variety of faith formation topics and activities. In the past churches have often chosen the “one size fits all” mentality for adult faith formation: How do we get every adult to participate in a small faith sharing group or to come to the Lenten series or to study the Bible? Adult faith formation is no longer about finding *the* program to attract all adults. It is about addressing the diversity of adult learning needs with a variety of faith formation activities. It is offering faith formation programming that is varied in content, expectations, depth, involvement, and timing. It is meeting individuals at the point of their spiritual and learning needs and offering personalized pathways of faith growth. Adults can create their individual “faith growth learning plans” to help them identify where they are on their spiritual journey, what they need, who else might share that need, and the resources that could help them meet that need. By expanding the options for adult learning (offering “something for everyone”), churches can engage more adults in faith formation, even if some of the offerings involve only one person.

Today, as never before, a local church has access to adult faith formation programming, resources, and networks, that can address the diversity. Resources for learning abound in every environment, for example iTunes University, part of

the iTunes Store, is possibly the world’s greatest collection of free educational media available to lifelong learners. With over 200,000 educational audio and video files available, iTunes U has quickly become the engine for the mobile learning movement. It puts courses and resources from over 150 universities and learning organizations into the hands of individuals, groups, and organizations.

The new reality of faith formation programming is that churches can offer activities that cater to niches— individuals and small groups with a particular spiritual or religious need, interest, passion, concern, or life issue. They no longer have to worry about reaching a “mass audience.” It is the end of the “one size fits all” mindset.

Designing Faith Formation for Baby Boomers

Begin by develop a task force of adults in their 50s and early 60s (the Baby Boom generation). Ministry and faith formation with Boomers should be designed, organized, and led by Boomers. The Task Force is responsible for designing a plan, organizing the implementation logistics, finding leaders and resources for the plan, monitoring progress, and conducting evaluations. The Task Force needs a coordinator/convener who facilitates the work of the Task Force and serves as a liaison between the task force and the church staff and church community.

Design Task 1. Develop an Inventory of Your Church’s Current Adult Faith Formation Programming.

Develop an inventory of your church’s current adult faith formation activities and programs that targeted at Baby Boomers and/or that involve Boomers. The inventory is developed around six models of faith formation: 1) faith formation on your own, 2) faith formation at home, 3) faith formation in small groups, 4) faith formation in large groups, 5) faith formation in the congregation, and 6) faith formation in the community and world. Use the format outlined on the worksheet to organize your inventory. After completing the inventory, discuss the state of your church’s response to Baby Boomers:

- What are the strengths in your current approach? What are the weaknesses?
- What is most effective in your current approach (programs, activities, etc.)? What is not?
- Which of the six models are being used most effectively? Which are not?
- Who is being served? Who is not?
- Where are the greatest needs or gaps? What are the priority areas for growth and improvement?

Design Task 2. Research the Life Issues and Spiritual/Religious Needs of Adults in Your Church.

By consulting research findings and listening carefully to Baby Boomers, the Task Force can determine foundational spiritual and religious needs, interests, and life tasks that faith formation with Baby Boomers should address. Analyze the information from the survey of the nine research studies on Boomers earlier in this journal issue to determine priority needs, interests, and concerns. (see “How Well Do You Know the Baby Boom Generation”). Using this knowledge, churches can expand their faith formation programming to offer enough variety to address the diversity of spiritual and religious needs, life tasks, and/or interests of Boomers.

Consider using the following categories to identify the needs and interests of adults in your church. Discuss the important issues and learning needs of Boomers in your church using the following questions. Feel free to adapt these questions and add your own.

- **Life Issues:** What’s happening in the lives and world of Boomers today and how does the Christian faith connect to these issues? How can faith formation help them view the myriad dimensions of human life today—family, work, leisure, relationships, sexuality, suffering and grief, social and political issues, community issues—in the light of the Gospel and faith tradition? How can faith formation equip and support them in making life choices and moral decisions as Christians?

- **Life Tasks:** What are the developmental life tasks facing 50- and 60-year-olds? How can faith formation integrate continued faith growth with the life tasks of adults in their 50s and 60s?
- **Milestones and Transitions:** What are the significant milestones/transitions in the life of Boomers that can be a focus of adult faith formation, such as geographic relocations, family formation and re-formation, career changes, empty nests, retirement, unanticipated illness, and the loss of loved ones? How can faith formation help people find meaning in their lives during these transitions and bring a faith perspective to the transitions adults are experiencing?
- **Religious Needs:** What are the significant religious learning needs of Baby Boomers? How can faith formation provide them with opportunities to deepen their understanding of the Bible and their faith tradition and beliefs, and relate their Christian faith to life today?
- **Spiritual Needs:** What are the significant spiritual needs of Baby Boomers? How can faith formation assist them in growing in their relationship with God and in living as disciples of Jesus Christ in their daily life at home, in the workplace, in the community and the world? How can faith formation deepen their practice of the spiritual disciplines and traditions in their daily lives?
- **Ethnic/Cultural Needs:** Who are the ethnic/cultural communities in your church? What are the unique lived experiences, needs, and aspirations of people from each ethnic/cultural community in your church? How can your church offer *culturally-specific* adult faith formation for each ethnic/cultural community in the church, and, when appropriate, in the language of the people? How can faith formation be *inclusive* of the traditions, heritages, and unique gifts of each ethnic/cultural community in your church?

Focus Groups

Consider organizing at least two focus groups of 10-12 people—one or more for Boomers in their 50s, and one or more for Boomers in their 60s. Be sure to select a diversity of adults who reflect the ethnic and socio-economic character of your church, and the various states in life (single, married, divorced, etc.) Use the following questions as the basis of your focus group interviews. Feel free to adapt the questions to your church.

1. How would you describe your age group in key words or phrases?
2. What are some of the key life tasks that your age group is experiencing?
3. What are some of the important life issues that your age group is experiencing today?
4. What are the most meaningful experiences you have in life? What makes these experiences meaningful to you?
5. How important is your relationship with God? Why?
6. Where do you experience God most?
7. What are the significant spiritual issues that your age group is experiencing today?
8. What is most important to you about being a Christian (or your particular faith tradition) today?
9. How do you live your Christian faith? Name some of the ways you put your faith into practice.
10. How can the church help you to continue growing as a Christian? Be specific. Name some of the things you would like to see your church offer for adults?

A Profile of Life Issues and Learning Needs

Based on the results of your research, discussion, and focus group interviews, develop a profile of the life issues and learning needs of Boomers in their 50s and a profile of Boomers in their 60s organized around the following categories: 1) Life Issues, 2) Life Tasks, 3) Milestones and Transitions, 4) Religious Needs, 5) Spiritual Needs, 6) Ethnic/Cultural Needs, and 7) What They Want the Church to Offer.

Complete your research by identifying ***the most important life issues and learning needs your church's adult faith formation should address in the coming year(s)***.

Design Task 3. Research Learning Activities, Leaders, and Resources to Address the Important Life Issues and Learning Needs.

Today, as never before, a local church has access to an abundance of adult faith formation programming, resources, and networks that can address the diversity of adult learning needs. Using the list of the most important life issues and learning needs as a guide, research the resources available to your church that will address these needs and eventually become part of your plan (see worksheet). Consider the following categories:

- **People Resources:** Conduct a gifts/talents/skills/knowledge survey of the people resources in your church, the wider community, the diocese/synod/regional church body, colleges and universities, church-related organizations, etc. who can be invited to take a leadership role in the adult faith formation plan. Consider people who teach courses or specialized programs, guest presenters on specialized topics, leaders for small groups and Bible studies, prayer guides/spiritual directors, leaders for service/mission programs, etc.
- **Physical, Face-to-Face Learning Activity Resources:** Identify face-to-face learning activities that you can use to address the priority issues and learning needs. There are a variety of options: 1) programs that your church is already sponsoring, 2) an opportunity that you are not utilizing (e.g., design reflection activities around Sunday worship), 3) a new program that your church can adopt, and 4) a program that you can promote as part of your plan and encourage adult participation. Consider programs in your church, the wider community, the diocese/synod/regional church body, retreat and conference centers, colleges and universities, church-related organizations, etc. Indicate the learning model(s) used in the program: Learning on Your Own, Learning in Small Group, Learning in Large Group, Learning in the Congregation, and/or Learning in the Community and World.

- **Print and Media Learning Activity Resources:** Identify print and media resources from publishers and learning organizations that you can use to address the priority issues and learning needs. Indicate the learning model(s) used in the resource.
- **Online Learning Activity Resources:** Identify online learning activity resources that you can use to address the priority issues and learning needs. Indicate the learning model(s) used in the resource,

After you have completed your research, review your work to determine if there are priority life issues and learning needs for which your church will need to design new programming.

Design Task 4. Design and Implement a Faith Formation Plan

1. Timeframe

Decide on the timeframe for your final plan. Will it be a plan for the whole year or will you develop seasonal plans (Fall, Winter-Spring, and Summer)?

2. Development of Integrated Adult Faith Formation Activity Plans

Use the research on learning activities, leaders, and resources, to create Adult Faith Formation Activity Plans that address each of the important life issues and learning needs (see worksheet). Decide which learning activities you will incorporate in your plan. You will also need to determine if there are priority needs for which there are no program resources. The team will need to design new programs to address these needs.

Six Faith Formation Models

We know from research that adult learners will chose the learning activity that best fits their learning needs, preferred modes of learning, and time constraints. In order to accomplish this, an adult faith formation needs to provide a variety of content and learning activities, and a variety of models for faith formation that include activities in physical places and virtual spaces.

Six models that should be part of adult faith formation include:

1. **Faith Formation on Your Own:** through reading, online courses, audio and video programs, movies, television programs
2. **Faith Formation at Home:** through Bible reading, storytelling and caring conversation, prayer and devotions, rituals and traditions, service
3. **Faith Formation in Small Groups:** through Bible and theology study groups, social issues study groups, faith sharing groups, lectionary-based groups, service/mission action groups, support groups, special interest groups
4. **Faith Formation in Large Groups;** through courses, speaker series, workshops, film festivals, retreats, conferences, intergenerational programs
5. **Faith Formation in the Congregation:** through Sunday worship, church year events and celebrations, service/mission activities, ministry and leadership in the church and community
6. **Faith Formation in the Community and World:** through programs, courses, clinics, workshops, and presentations at universities, retreat centers, YMCAs, libraries, bookstores, regional church programs; through engagement in community/political action, local and global service and justice projects

Face-to-Face & Online

Adult faith formation includes learning activities in physical places and virtual spaces, blending face-to-face, interactive learning with virtual, online learning. Online websites, social networking services, and digital technologies (e.g., an iPod Touch, smart cell phones) mean that churches can deliver faith formation experiences and resources anytime and anywhere, reaching people wherever they go online (home, work, school, vacation, coffee house). The interplay between learning in physical places and virtual online spaces can revolutionize adult faith formation in a church.

An Adult Faith Formation Activity Plan incorporates a variety of options for learning in face-to-face, physical places and in virtual, online spaces.

- **Physical:** church, homes, coffee shop, colleges, service/mission sites, retreat centers, monasteries, theaters, community sites, etc.
- **Online:** audio and video podcasts, print resources, online courses, website links for further learning, online community and social networking, topic-specific blogs, etc.

For example, an Adult Faith Formation Activity Plan for Lent on the church-wide theme of repentance and conversion, could have the following learning activities:

- book of Scripture readings, reflections, and prayers for each day of Lent (print and online)
- all of the sermons/homilies during Lent focus on repentance and conversion and are available online in MP3 files with a personal and small group study guide
- daily Bible reading, reflections, and prayer are emailed to all of the adults in the church and are available online
- a Sunday morning Bible study on the Lenten lectionary readings is offered after Sunday worship service; an online group meets during the week to study and reflect on the readings
- a guest speaker presents a two-evening program on repentance and conversion in the Christian life during the first two weeks of Lent; the program is video-taped and available online in a podcast with a study guide
- a retreat day on the theme of conversion is conducted at the local retreat house the week prior to Holy Week; for those who cannot attend an online retreat experience is offered
- resources for Lenten study and reflection are available online
- a reconciliation service is offered during the third week of Lent

Each Adult Faith Formation Activity Plan seeks to incorporate a variety of ways to learn: differing levels of depth and commitment, a variety of learning models reflecting the diversity of learning styles, online and face-to-face learning, and times and locations that are convenient for adults. This approach means that

adults can have a variety of ways to learn a topic, removing many of the more common obstacles to adult learning in churches.

3. Balance

Review each Adult Formation Activity Plan to make sure you have balance among the six faith formation models (on your own, at home, in small groups, in large groups, in the congregation, in the community/world) and between learning in physical places and in virtual spaces.

4. Leadership

Using the research you conducted into people resources, identify leaders who will be involved in coordinating/conducting/facilitating individual learning activities. Determine which learning activities still need leaders and develop a plan for finding and preparing leaders for their role.

5. Church Website

Consider how you will use your church's website as part of your Adult Faith Formation Plan. For example:

- ✓ provide adult formation programming online for adults
- ✓ provide resources for adults to download
- ✓ connect adults to faith formation programs on other websites
- ✓ network adults engaged in faith formation
- ✓ market/advertise adult formation offerings

6. Program Guide

Create an adult faith formation program guide with your annual or seasonal offerings (your "course catalog" and calendar) in print format and online format (PDF, online calendar, etc.). Develop descriptions for every learning activity, indicating clearly the content or focus of the program and the particulars, such as date, location, cost, time, website location, etc.

7. Spiritual/Learning Assessment

Create an assessment tool (with a print and online version) that can help adults in your church assess their spiritual growth and identify their needs for learning. The United Methodist Church of the Resurrection in Leawood, KS has

developed a tool to assist adults in their church to assess where they are in their faith journey and their needs of continuing growth and learning.

We invite you to join us on the greatest journey of your life – The Journey of Knowing, Loving and Serving God – as we strive to become a community of deeply committed Christians. We know that sometimes getting started can be daunting, especially in such a large church, but we want to travel this journey with you. Our Adult Discipleship Ministry offers you a navigation system that provides directions, routes and traveling companions to support and encourage you along the way. We believe that nothing in the world will bring you greater joy, greater challenge and greater meaning than the journey into life as God intended us to live it. To help encourage and equip you for your Journey, we've created the Journey assessment tool.

Visit their website to see their adult faith formation offerings and the assessment tool:
www.cor.org/programs-ministries/the-journey/welcome-to-your-self-assessment.

8. Marketing

Develop your marketing plan for adult faith formation. Consult the handout, “Marketing Suggestions” for a process and ideas. United Methodist Communications has an excellent online guide with a process and practical strategies for developing a marketing plan:
www.umcom.org/site/c.mrLZJ9PFKmG/b.5160951/k.54F3/Church_Marketing_Plan.htm.

9. Evaluate

Develop an evaluation form for each type of faith formation activity so that you can receive feedback on the quality and effectiveness of the learning activity (see worksheet for examples). These can be done online or in person. Each season schedule a team meeting to review the past season’s offerings, make adjustments and revisions, and plan for the next season.

Programming Resources

- Gentzler, Richard H. *Aging and Ministry in the Twenty-First Century: An Inquiry Approach*. Nashville: Discipleship Resources, 2008.
- Hanson, Amy. *Baby Boomers and Beyond: Tapping the Ministry Talents and Passions of Adults Over Fifty*. San Francisco: Jossey Bass, 2010.
- Hanson, Amy. “Breaking Down the Age Barriers: How Churches are Becoming Intentionally Intergeneration.” Leadership Network. (www.leadnet.org/Resources_Downloads.asp)
- Hanson, Amy. “Churches Responding to the Age Way: Top Innovations in Older Adult Ministry.” Leadership Network. (www.leadnet.org/Resources_Downloads.asp)
- McIntosh, Gary. “Trends and Challenges for Ministry among North America’s Largest Generation.” *Christian Education Journal*, Series 3, 5/2.
- Pettegrew, Hal. “Perspectives on the Spiritual Development of ‘Aging’ Boomers.” *Christian Education Journal*, Series 3, 5/2.
- Vogel, Linda. “Creating Learning Environments for Mature Adults that Foster Creating and Faith Formation.” *Christian Education Journal*, Series 3, 5/2.

Websites

- AARP: www.aarp.org
- Any Hanson (*Baby Boomers and Beyond*):
<http://amyhanson.org>
- Christian Association Serving Adult Ministries Network (CASA): <http://gocasa.org>
- Civic Ventures: www.civicventures.org
- Encore Generation at Leadership Network:
www.leadnet.org
- Faith Formation Matters (Janet Shaeffler, OP):
www.janetschaeffler.com/
- Older Adult Ministries (United Methodist Church):
www.gbod.org/site/c.nhLRJ2PMKsG/b.3784737/k.7977/Older_Adult_Ministries.htm
- Presbyterian Older Adult Ministries Network (POAMN): www.poamn.org
- Senior Adult Ministry (Johnson Institute):
www.senioradultministry.com
- Senior Evangelism Partnership:
www.seniorevangelism.org/index.cfm

An Inventory of Faith Formation for Baby Boomers

Use this format to develop an inventory of your adult faith formation programming.

1. Learning on Your Own

- Examples: reading, online courses, audio and video programs, movies, television programs

What are the ways your church promotes and supports Learning on Your Own?

Learning Activity	Participants/Target Group	Resources Used	Delivery System	Date/Time

2. Learning in Small Groups

- Examples: Bible and theology study groups, social issues study groups, faith sharing groups, lectionary-based groups, service/mission action groups, support groups, special interest groups

What types of small groups does your church offer?

Type of Small Group	Topic/Theme	Participants/Target Group	Resources Used	Date/Time

3. Learning in Large Groups

- Examples: courses, speaker series, workshops, film festivals, conferences, intergenerational programs

What types of large group learning activities or programs does your church offer?

Learning Activity/Program	Topic/Theme	Participants/Target Group	Resources	Date/Time

4. Learning in the Congregation

- Examples: Sunday worship, church year events and celebrations, service/mission activities, ministry and leadership in the church and community

How are people helped to learn through their participation in congregational events and ministries?

Church Event or Activity	Date/Time	Ways People Are Helped to Learn through their Participation

5. Learning in the Community and World

- Examples: programs/courses/clinics/workshops/presentations at universities, retreat centers, YMCAs, libraries, bookstores, regional church programs; through engagement in community/political action, local and global service/justice organizations and projects

How does your church utilize and promote learning opportunities in the community/world? How does your church support people's participation and help them to learning through their participation ?

Learning Activity, Group, or Program	Organization	Ways People Are Helped to Learn through their Participation	Date/Time

Researching Baby Boomer Life Issues and Needs

Together as a team research and discuss the important issues and learning needs of Baby Boomers in their 50s and Baby Boomers in their 60s.

Life Issues

- What's happening in the lives and world of Boomers in your church today: family, work, leisure, relationships, sexuality, suffering and grief, social and political issues, etc.?

Life Tasks

- What are the developmental life tasks facing adults in 50s and 60s?

Milestones and Transitions

- What significant milestones/transitions are Boomers in your church experiencing, such as geographic relocations, family formation and re-formation, career changes, empty nests, retirement, unanticipated illness, loss of loved ones, etc.?

Religious Needs

- What are the significant religious learning needs of Boomers in your church, such as understanding the Bible and relating it to today, understanding the faith tradition and beliefs and how to live them today, making Christian moral decisions, etc.

Spiritual Needs

- What are the significant spiritual needs of Boomers in your church, such as growing in their relationship with God; living as disciples of Jesus Christ in their daily life at home, in the workplace, in the community and the world; spiritual disciplines and traditions; prayer, etc.?

Ethnic/Cultural Needs

- What are the unique lived experiences, needs, and aspirations of Boomers from each ethnic/cultural community in your church?

Researching Faith Formation Resources

Use this format to research and catalog your learning resources.

1. People Resources

- Using your priority issues and learning needs as guide, conduct a gifts/talents/skills/knowledge survey of the people resources in your church, the wider community, the diocese/synod/regional church body, colleges and universities, church-related organizations, etc. who can be invited to take a leadership role in the adult faith formation plan. Consider people who teach courses or specialized programs, guest presenters on specialized topics, leaders for small groups and Bible studies, prayer guides/spiritual directors, leaders for service/mission programs, etc.

Life Issue/Learning Need	Potential Program Leader	Particular Gift/Talent/Skill/Knowledge

2. Face-to-Face Learning Activity Resources

- Identify face-to-face learning activities that you can use to address the priority issues and learning needs. There are a variety of options: 1) programs that your church is already sponsoring, 2) an opportunity that you are not utilizing (e.g., design reflection activities around Sunday worship), 3) a new program that your church can adopt, and 4) a program that you can promote as part of your plan and encourage adult participation. Consider programs in your church, the wider community, the diocese/synod/regional church body, retreat and conference centers, colleges and universities, church-related organizations, etc.
- Indicate the **learning model(s)** used in the program: Learning on Your Own, Learning in Small Group, Learning in Large Group, Learning in the Congregation, and/or Learning in the Community and World.

Life Issue/Learning Need	Learning Program & Sponsor	Learning Models	Location	Date/Time	Cost

3. Print and Media Learning Activity Resources

- Identify print and media resources from publishers and learning organizations that you can use to address the priority issues and learning needs.
- Indicate the **learning model(s)** used in the resource: Learning on Your Own, Learning in Small Group, Learning in Large Group, Learning in the Congregation, and/or Learning in the Community and World.

Life Issue/Learning Need	Resource	Producer	Learning Models	Cost

4. Online Learning Activity Resources

- Identify online learning activity resources that you can use to address the priority issues and learning needs. Review the **Adult Faith Formation Resource Guides** for assistance.
- Indicate the **learning model(s)** used in the resource: Learning on Your Own, Learning in Small Group, Learning in Large Group, Learning in the Congregation, and/or Learning in the Community and World.

Life Issue/Learning Need	Website	Learning Activity	Website Address	Cost

Integrated Adult Faith Formation Activity Plan

Create Adult Faith Formation Activity Plans to address each of the important life issues and learning needs. Decide which learning activities you will incorporate in your plan. You will also need to determine if there are priority needs for which there are no program resources. The team will need to design new programs to address these needs.

An Activity Plan addresses a life issue or learning need with learning opportunities and resources using the six faith formation models:

1. faith formation on your own
2. faith formation at home
3. faith formation in small groups
4. faith formation in large groups
5. faith formation in the congregation
6. faith formation in the community/world

An Activity Plan incorporates a variety of ways to learn in face-to-face, physical places and in virtual, online spaces.

- **Physical:** church, homes, coffee shop, colleges, service/mission sites, retreat centers, monasteries, theaters, community sites, etc.
- **Online:** audio and video podcasts, print resources, online courses, website links for further learning, online community and social networking, topic-specific blogs, etc.

Each Adult Faith Formation Activity Plan seeks to incorporate a variety of ways to learn: differing levels of depth and commitment, a variety of learning models reflecting the diversity of learning styles, online and face-to-face learning, and times and locations that are convenient for adults. This approach means that adults can have a variety of ways to learn a topic, removing many of the more common obstacles to adult learning in churches.

Example

Spiritual Formation Activity Plan

Focus: Learning Spiritual Disciplines and Practices

On Your Own

- Daily Prayer: www.sacredspace.ie, www.taize.fr, www.upperroom.org, www.loyolapress.com
- Fixed Hour Prayer: www.explorefaith.org/prayer/fixed/hours.php
- Spiritual Guides: a list of individuals available for 1-1 spiritual mentoring
- Spiritual Reading: a list of recommended books on the church website
- Online Retreat: *A 34 week retreat for Everyday Life* from Creighton University, <http://onlineministries.creighton.edu/CollaborativeMinistry/cmo-retreat.html>
- Weekly and Seasonal Prayer Resources: online and in booklets
- Online Spirituality Course: 40-day retreats with spiritual guides like Thomas Merton, Joyce Rupp, Henri Nouwen, and Joan Chittister from Spirituality and Practice, www.SpiritualityandPractice.com

In Small Groups

- Spiritual Formation Course: *Companions in Christ: A Small-Group Experience in Spiritual Formation*, Upper Room Books, www.companionsinchrist.org

In Large Groups

- Intergenerational Learning Programs on Prayer: monthly sessions for all ages on prayer practices
- Retreat Experience: at church or a retreat center
- Workshop Series on the Spiritual Disciplines: Lectio Divina, silence, contemplation, the Examen, meditation, spiritual reading, fixed hour prayer
- Monastery Trip: experiencing monastic life

In the Congregation

- Prayer Room: with resources about prayer and spiritual practices
- Advent and Lent Prayer Services

Adult Faith Formation Activity Plan Worksheet

Use this worksheet for each life issue or learning need that you will include in your Adult Faith Formation Plan.

Life Issue or Spiritual/Religious Need: _____

Target Participants: _____

Faith Formation Activities

Faith Formation Model List each activity.	Resources List resources to be used.	Leaders List leaders involved.	Date Time
Faith Formation on Your Own			
Faith Formation at Home			
Faith Formation in Small Groups			
Faith Formation in Large Groups			
Faith Formation in the Congregation			
Faith Formation in the Community & World			

Marketing Suggestions

Creating Your Message

Here are five things to remember as you develop your marketing plan. You may need to develop several “messages” for each target audience. Be sure to pay careful attention to the titles of your programs so that they capture people’s interests. Develop descriptions that are positive in tone, indicate clearly the content or focus of the program, and include the particulars (date, location, cost, and time).

1. **Find the inherent drama within your offering:** What’s interesting in your program offerings? How does it respond to something within the lives of people? Connect the program offerings to the real needs of adults.
2. **Translate that inherent drama into a meaningful benefit:** What are the major benefits in participating in adult faith formation? Why should people respond? The benefit should come directly from the inherently dramatic feature. And even though you have four or five benefits, stick with one or two—three at most.
3. **Get people’s attention:** How will you interest people in adult faith formation? People pay attention to things that interest them. So you’ve just got to interest them.
4. **Motivate your audience to do something:** What do you want people to do once you’ve introduced the adult faith formation offerings? You must tell people exactly what you want them to do. Tell them to go online a register for a program, complete an interest finder, send in a registration form, call someone, etc.
5. **Be sure you are communicating clearly:** Do adults understand what you’re talking about? Make sure you are putting your message across. Show your promotion or booklet or advertising to ten people and ask them what the main point is. If one person misunderstands, that means 10 percent of the audience will misunderstand. Make revisions so your message is clear.

Developing Your Marketing Strategies

1. Create a seasonal or annual adult faith formation program booklet in various formats: print, online in PDF, online calendar, etc.
2. Use your church’s website to post regular announcements, new program offerings, calendar, etc.
3. Establish a Facebook site for your church’s adult faith formation and include a calendar of events with descriptions, locations, times, a link to your church’s website, current news, stories from adults who are participating in learning activities, etc.
4. Send email invitations. Target your message to particular groups or ages.
5. Send personalized and targeted invitations by mail to people with a letter, program booklet, registration form, etc.
6. Have the pastor share the importance and benefits of adult faith formation and the church’s program offerings at Sunday worship.
7. Use orientation or information sessions to describe the benefits of adult faith formation and introduce each new season of adult faith formation programming (e.g., coffee and donuts after Sunday worship).
8. Promote program offerings in the community: coffee shops, YMCA/YWCA, gyms, bookstores, theaters.
9. Include information about adult faith formation offerings in new member packets. Send a personalized invitation to new members with the program booklet.
10. Send a personalized invitation and program booklet to newly married couples, parents who are having their children baptized, adults who have been fully initiated into the church (RCIA), et al.
11. Develop an introductory brochure on adult faith formation, the types of programs offered, and how to get more information and register for programs on the church’s website.