



# THE ENCORE CAREER HANDBOOK

by Marci Alboher • [encore.org/handbook](http://encore.org/handbook)

A complete guide to finding passion, purpose, and a paycheck in the second half of life.

## Transition Group Guide

Planning an encore career—one that combines personal meaning, continued income and social impact—is a highly personal process. There will be days when you feel like the wind is at your back and that you’ve hit your stride. Other days will find you dealing with setbacks or inertia. It can be a lonely business, but it doesn’t have to be. We’ve compiled this guide to help you create an Encore Transition Group—your own team of like-minded cheerleaders.

While this guide offers a clear structure of how to create and run your transition group, it’s designed to be used flexibly. You can follow its suggestions precisely, add your own ideas or skip any sections that don’t make sense for your group.

### *You can use this guide in several ways:*

- As a template for setting up a group from scratch.
- To help transform an existing group (such as a book, knitting or investment club) into one that explores encore transition issues.
- As an accompaniment to *The Encore Career Handbook*. While the proposed meeting agendas follow the book closely, the guide can be useful for people who don’t want to go through it chapter by chapter.
- And for those who want more, rather than less, we offer additional meeting topics and resources at the end.

We’d like your feedback, too. If your group is doing something interesting, please write us. Send suggestions. Let us know what’s working and not working and what ideas you’d like to share with others. You can email [ECH@encore.org](mailto:ECH@encore.org) with the words “Encore Transition Group” in the subject line. From time to time, we’ll post tips and advice from different groups, and we’ll also be working on ways to help groups connect with each other.

For now, good luck as you move ahead creating your own group—and your own encore!

The guide was heavily influenced by “A Guide to Creating a Project Renewment Group” by Bernice Bratter and Helen Dennis and by the “Happiness Project Group Starter Kit” by Gretchen Rubin. We gratefully acknowledge the trails blazed by these authors.

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## Guide to Creating an Encore Transition Group

### Why an Encore Transition Group?

You may have recently retired, moved to a new place or found yourself at some other kind of crossroads. Maybe you're just thinking there must be something you can do to help better society. Whatever your reasons for moving into an encore, one of the hardest parts of any career or life transition is keeping up momentum and finding a sense of belonging as you move away from the familiar and into new (for you) territory. A transition group can help ease this process by serving many functions:

- **Motivation.** Members can help each other stay motivated and on track as they go through their encore transitions.
- **Accountability.** Members can hold each other accountable for the actions they commit to, such as finishing a resume, finding the right volunteer opportunity or scheduling a certain number of informational interviews within a certain period of time.
- **A safe space.** A group can provide a protected forum for members to explore their interests and changing needs. An environment based on peer support and mutual trust can inspire you to experiment and take some risks.
- **Shared purpose.** Finally, an encore transition group can be a place for members to build on or create an identity as encore activists—or to engage in activism or social purpose work as a collective.

### Who's in Your Group?

Encore transition groups can take many forms. Some will develop among people who already know each other through existing groups, such as a book or knitting club, an alumni association or exercise class. Others will be created by people coming together specifically to work on their encore transitions. Either way, the success of your group will depend on its members, and you'll want to make sure you have the right people in your group. Think of it like forming a book club. The group will work a lot better if everyone agrees on the details—what you're reading (contemporary fiction as opposed to sci-fi, for instance), how often you're meeting and whether snacks will be served.

Whatever choices you make about your group and its members, the commitment of each person to participate actively will be a key factor to a successful and satisfying experience for all members.

As you develop your group, think about the following issues:

### *How Many Group Members?*

- Consider how large you want the group to be as you start talking to others about joining.

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- We recommend you aim for two to 12 people; anything bigger can become unmanageable and impersonal.
- Ideally, your group will be large enough to function well even when some of the members are absent, but small enough for all the members to participate actively.

### ***What Kind of Members Are You Looking For?***

- Seek out people you would want to see in a social setting, people whom you respect and trust.
- While not all members will become your confidants or close friends, at the very least try to involve people with whom you could imagine sharing a cup of coffee.
- Look for people willing to commit to the goals of the group—and who agree on what those goals are.
- Members might also converge around an issue of common interest, such as education, or even a type of work like encore entrepreneurship. As you explore your goals, people with aligned interests may decide to create their own group. Sometimes, after members have been meeting for a while, a subgroup will discover similar goals and decide to split off to concentrate on their shared interest.

### ***How Might You Find Group Members?***

- Referrals from friends, family, colleagues, alumni or professional groups.
- Online social networks. Consider posting in the Encore Careers LinkedIn Group or on the Encore.org Facebook page to see if people near where you live would like to start a group.
- If geography or in-person meetings are a challenge, you could create a group that meets virtually through a free conference call service or Google group chat.

### ***What Stage of Transition Should Members Be In?***

- This is a matter of preference for you and other members.
- You may want to work with people who are all in the same stage of transition (for instance all members are at the early juncture of figuring out what they want).
- You may prefer a group with members at different stages of transition, with some just beginning to figure out what they want and others at the more advanced stage of mapping out how to get to where they've decided they want to be.

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The composition of the group will influence how discussions and activities are organized at meetings. A group that's smaller and/or more homogeneous may lend itself to full-group discussions. More diversity or a bigger group may mean that discussing some topics in small groups or pairs will work better. Having a mixed group sets up some people to serve as mentors to others, which itself is a type of encore activity.

### How to Manage Your Group

Agreeing on ground rules and establishing common expectations will be key to your group's success. Focus on management issues in the setup phase and make sure all members are on board and agree on the general guidelines you will follow. A group with a deliberate process will have better outcomes, more productive meetings and fewer frustrations.

Issues to consider:

#### *Leadership*

Do you want a designated facilitator who runs your meetings? If yes, will one person take on this role or will it rotate among members?

A designated facilitator will enable meetings to run more efficiently. In the beginning, you may want to assign this role to someone who has group leadership experience. Over time, consider rotating this role so that others get a chance to lead. You may also choose to appoint co-facilitators who can share the meeting leadership.

#### *The Facilitator's Role*

Your group leader or facilitator opens and closes the meetings, sets the tone for the discussion, helps members offer support to each other and deals with any problems that come up during the meeting. The facilitator can also take responsibility for finding the meeting venue, organizing refreshments and other logistics—another good reason to consider rotating this role.

An ideal facilitator will possess the following qualities:

- A willingness and ability to perform tasks between meetings, such as gathering materials to present to members; organizing outside speakers; and handling the communication and logistics to set up meetings.
- A commitment to attend all meetings.
- Positive energy and a positive attitude.
- An interest in helping others.

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### *Tips for Leading Your Group*

- Manage the clock. Ask someone to keep track of the time.
- Encourage participation. Develop strategies to ensure all members have an opportunity to contribute. Call directly on members who have been particularly quiet, or speak to them individually outside of meetings and ask for feedback on ways they would feel more comfortable participating.
- Keep it honest. Encourage open and frank discussion among participants.
- Focus. If the discussion strays off topic, gently bring members back to the main agenda. One way is to suggest pursuing the side-topic after the meeting or at another meeting.
- Build trust. Members need to feel safe to disclose sensitive information, and they need to feel confident that such information will remain in the room unless they instruct the group otherwise. One method is to declare that the group will follow “Vegas Rules” (what is said in Vegas stays in Vegas). Ask members for a show of hands that they are willing to follow the rules. And if members are speaking about something particularly sensitive, they can preface with a reminder about the Vegas Rules.
- Be constructive. Agree on language for making helpful observations and strive to be positive and avoid personal attacks. Rather than saying “I disagree” or “That’s a bad idea,” solicit input from others in the group about alternative options. If the conversation veers off topic, simply note that the discussion has moved away from the agenda rather than singling out a particular individual for heading off course. If conflicts arise, ask everyone to take a break and let emotions subside.
- Define your role. Decide if the facilitator will take part in exercises or focus on leading.
- Communicate. Occasionally, members may need to miss meetings. Consider ways of keeping absent members informed about what was discussed. For instance, each person might select a buddy for mutual updating, or people might talk to the facilitator after a missed meeting. Some groups may choose to designate the facilitator or have members alternate sending around an email summary of each meeting to all members.

### *Should You Use an Outside Facilitator?*

You may choose to hire an outside facilitator to run your meetings on a temporary or permanent basis. Doing so can be useful for groups where no members want to commit to the time or feel comfortable taking on a leadership role. It can also free up all members to fully take part in exercises and discussion.

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Payment will be a consideration when deciding whether to use a professional facilitator for your group. Discuss how much members would be willing to contribute and whether you would prefer to pay a per-meeting fee or a flat rate for a series of meetings. Consider whether you have something to offer as barter. For example, a facilitator interested in exploring encore ideas herself may be willing to lead the group in exchange for marketing assistance, editing help, yoga or cooking instruction or even a LinkedIn recommendation or testimonial. It's also possible you may find a person willing to facilitate without pay, such as an experienced group leader who sees working with you as his or her own encore opportunity, or a person training to become a coach.

If your group decides to use a professional facilitator, look for someone with experience in counseling, coaching or social work and who has participated successfully in groups, on boards of directors or on committees of various kinds. If you need help finding someone, you can post a note that you are seeking a transition group facilitator in your region on Encore's Facebook and LinkedIn pages and search Encore's regional pages at [encore.org/connect](http://encore.org/connect). You might also find leads through [lifeplanningnetwork.org](http://lifeplanningnetwork.org).

When considering facilitators, look for someone who's worked with groups that have a similar focus to yours, are composed of similar demographics or meet in a similar format. You don't necessarily need a career expert on transitions, though your meetings will be more productive if you select someone who's familiar with some encore issues, like moving into the nonprofit sector or social activism. It's important to find a person you like, who gets positive recommendations from people you trust and who knows how groups develop, work together and come to closure.

Ask any potential facilitator how she or he would approach creating good discussions in a group composed like yours.

### **Where and When Should You Meet?**

Select a time and location that will make it possible for the majority of members to attend.

While the site you choose should be accessible and comfortable, it also needs to fit your group. Meeting in a member's home can add an element of comfort, but meeting in public places is more appropriate when members don't know each other well. Such groups should consider using a library, school or other public space. A centrally located coffee shop may also appeal as long as it's a comfortable place to have somewhat private conversations and the proprietors will not object to your group staying for a couple of hours.

Once you have selected a location, devise a system for making room reservations or other setup arrangements as needed.

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### How Many Months Might Your Group Last?

Following the sample agendas we've provided and meeting every other week will take roughly six months. That's a natural juncture for members to check in and reflect on how the group is working, if people want to continue and to figure out next steps for the group. Keep in mind that the average encore transition takes about 18 months, so it is likely that even after six months, people may just be starting to get some traction. It is also quite likely that members will continue to support each other even after some have reached their encore goals.

If you're particularly eager and motivated, you can push through the agenda faster by meeting weekly, but that won't necessarily speed up your overall transition.

### How Long Should a Typical Meeting Run?

We recommend meetings run between 90 minutes and two hours. If your group has fewer than five people, you may be able to manage with shorter meetings. If your group is on the larger side, allot enough time to ensure everyone has an opportunity to contribute.

### How Should Your Group Make Decisions?

Your group will need to decide everything from whether you'll serve snacks to how you'll move a meeting along to the next activity or topic. Some groups authorize a single person or pair (such as the facilitator/s) to make decisions after hearing the views of members. Others adopt the policy of making decisions by a majority vote. Whatever your approach, choosing a process early on will help keep meetings orderly and avoid misunderstandings.

### Should You Involve New People?

Think about whether you want your group to be open to new members once it's established and if so, how you'll integrate them. Open groups welcome new members to join at any time. Closed groups may choose never to allow new members or may designate certain times (such as within the first month) or parameters (like women-only) for accepting new members.

Transition groups often work best when people respect and trust the other members. So we expect that many encore transition groups will be closed groups. However, consider opening your group to outside people on a periodic basis—say, once a quarter—as a way to support people just beginning their transition and to encourage others to join the encore movement. At those open meetings, you can share success stories and offer mentorship to others considering starting an encore transition group.

If you admit new members while your group is still working through *The Encore Career Handbook* chapters, the facilitator should take the time to orient the new members to what has happened in prior meetings.

### Meeting Structure

This guide offers 11 sample agendas for group meetings as well as suggested topics for additional meetings. These agendas complement the chapters in *The Encore Career Handbook*. Before the first meeting, we suggest that everyone read the introduction and first chapter of *The Encore Career Handbook* and complete “The Encore Readiness Quiz” on page 14. That will provide a shared context for your first meeting and help members identify what stage of their encore transition they are in and why they want to join your group. Our sample agendas follow this general format:

**Check-in** Members share brief (1-2 minute) updates on their developments since the last meeting. If you ended the last meeting with a group assignment, like updating a resume or developing a list of organizations to contact, updates can include what members did. (25 minutes)

**Topic for full group discussion** The sample agendas provide a suggested topic for discussion that ties into a particular chapter of *The Encore Career Handbook*. Your group may feel comfortable using the suggested questions to kick off a free-flowing conversation, or you may want your facilitator to actively guide that conversation. If a facilitator is guiding the conversation, it’s helpful to begin by posing the first question and going around in order so that all members who want to contribute get a chance to speak. Allow for some back and forth. When the conversation starts to lull, introduce the next question. (40 minutes)

**Small group activity** This guide includes suggested interactive exercises for each meeting, which can be done individually or in groups of two to four people. For these activities, we recommend groups move apart to do the work. Subgroups should nominate one person to report their results when the whole group reconvenes. (40 minutes)

**Wrap-up** Share news of interest to the group. Perhaps a nonprofit you’re involved with is hosting a fundraiser, or the public library is offering a free tutorial on LinkedIn or a Purpose Prize winner is going to be speaking. If someone is looking for help with something particular, this is a good time to tap the group for support. For quick questions like what’s the best local organization working on homelessness, members may offer ideas on the spot. Larger questions that will take more time to tackle, such as a request for help in preparing for a talk, may best be handled by getting a show of hands response and letting members follow up with each other after the meeting. (10 minutes)

**Assignment** Set the stage for the next meeting by deciding what the topic or activity will be, and assign homework if necessary. (5 minutes)

*Note for facilitator:* Prompts to enhance discussion are included throughout the guide.

### Going Further

The activities in the 11 sample agendas tied to *The Encore Career Handbook* relate to specific sections of the book. In some, but not all, agendas, we note where you may want to consider additional meetings or other kinds of activities—like

watching a video together and discussing, having a guest speaker or reading and discussing a book of interest to the group. We also refer you to appropriate additional resources listed at the end of the guide.

## MEETING 1

# Getting Started

### Welcome & Introductions

The first meeting is a time for group members to get acquainted and discover the various ways they can provide and receive support. Consider scheduling extra time for this meeting so that the logistical issues can be addressed without rushing.

Decide in advance who is facilitating and ask people to read Chapter 1 and take the “The Encore Readiness Quiz” before the meeting.

At the meeting, ask everyone to introduce themselves in less than five minutes using the prompts below. A timer will be handy (most smartphones have one) as will a reminder that brevity is a virtue. Exercises like this can spark all kinds of side conversations. So that you also have time to get to something meaty in this first session, encourage people to follow up on interesting strands and connections *at the end* of the meeting rather than on the spot.

- My name is \_\_\_\_\_
- My working life has included stints as \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ (no more than three, fine to include parenting, caregiving and grandparenting!).
- Something unique about me is \_\_\_\_\_.
- What brought me here today is \_\_\_\_\_.
- I agree to follow “Vegas Rules” (what is said in Vegas, stays in Vegas) and honor members’ privacy and treat sensitive information with respect.

*Note for facilitator:* Write these prompts on a white board, flip chart or on pieces of paper that you hand out to everyone in advance. As people share their stories, note common themes, emerging patterns and expertise that members are bringing to the group. For instance, many may express concern about money, or interest in the healthcare field or a need for support around eldercare. Before launching into the discussion topic, remind people that privacy was part of the introductions for an important reason: people need to feel safe and trust each other for a group like this to succeed.

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### ***Topic for Full Group Discussion: Where Are We?***

- How are people feeling after dipping into the book a bit?
- What kinds of things did you learn about yourself from taking “The Encore Readiness Quiz”?
- What opportunities and barriers are you seeing right now regarding your own encore readiness?
- Are there people in the group who are willing to share expertise or resources in areas that have been mentioned? For instance, if someone has recently gone back to school and several members have expressed an interest in returning to school, consider a future meeting where that member will lead a discussion—or be available one-on-one to answer questions and provide information.

### ***Things to Establish at the First Meeting***

- How does the group want to communicate between sessions?  
Communication between meetings is a key to success as people need to be reminded about scheduling and homework. Email is typically most efficient for sending out reminders, and it’s easiest if one person takes on the responsibility for organizing the communication. If members are comfortable with technology, a private Facebook or LinkedIn group is also an option.
- How will you make decisions as a group?
- How open are members to fielding questions and communicating outside of the group? While good friendships often develop in these kinds of groups, some people will want or need to limit their participation to meetings. Someone who has expertise in a certain area, such as human resources, may not want to field questions outside of group meetings. It will be helpful for all to establish limits early on.
- Is everyone present at the first meeting interested in returning?

*Note for facilitator:* Participants who aren’t interested in returning may not feel comfortable discussing their reasons with the group. If they aren’t forthcoming, consider asking them privately after the meeting if they are open to sharing their specific reasons.

### ***Wrap-Up***

Share news of interest to the group.

### ***Assignment for Next Session***

- Read Chapter 2.

### MEETING 2

# Exploring Your Motivations

#### **Check-In**

Members share brief (1-2 minute) updates on their developments since the last meeting.

#### ***Topic for Full Group Discussion: What's Motivating You?***

Some people are driven by how or where they want to work: with a large group of people or in a team; as an employee or an unpaid adviser; as the leader or founder of an organization; in an office setting or outdoors. Others are energized by a cause or issue they care about. Still others are motivated most by a skill they want to use.

Some questions to consider:

- What are your key drivers? Can you identify what gets top priority as you think about what you'd like your encore to look like?
- What is one "have to have" and one "must not have" for you in your next life stage?
- Do you have other thoughts to share after reading Chapter 2?

#### ***Small Group Activity: Brainstorm Possibilities***

In small groups, try out the "Brainstorm Possibilities" exercise on page 32. Give about 5 minutes per person. Return to the entire group, nominating one person to speak and share any useful results (as well as dead ends) that came out of the brainstorm. If someone feels stuck, give the bigger group a chance to brainstorm for that person.

#### ***Wrap-Up***

Share news of interest to the group.

#### ***Assignment for Next Session***

- Read Chapter 3.
- Complete as many exercises as you can.

### MEETING 3

# Discovering What You Want

## Check-In

Members share brief (1-2 minute) updates on their developments since the last meeting.

### *Topic for Full Group Discussion: What Do You Want?*

Did everyone do the exercises? If not, discuss why people had resistance or didn't get to them.

Some issues to discuss:

- What did the exercises bring up for you?
- What kinds of insights, if any, did you have?
- Are there things you want to share relating to your findings?
- How do people feel about these types of self-assessments?
- Are they valuable or not?
- What kinds of things have you learned in the past from doing this kind of self-examination?

### *Small Group Activity: Patterns of Reinvention*

Take a moment to read "Patterns of Reinvention" on pages 42–43. In small groups or pairs, ask everyone to tell a story (either about themselves or someone they know) where one of these patterns has played out. If you can't think of a story, listen to other people and see if it inspires you to recall a pattern you have witnessed in another person. Return to the entire group, nominating one person to speak and share story highlights from your subgroup.

## Wrap-Up

Share news of interest to the group.

### *Assignment for Next Session*

- Read Chapter 4.

## Going Further

If members want more time to explore their individual passions, consider dedicating a meeting to discussing and doing exercises from Chapter 3 together. This could include all members or a subgroup

of people who want to dig deeper into assessments together. Consider "Clearing the Decks," "What's Your Attraction Signal" and "Examine Your Motivations" on pages 45, 46, and 48 for group conversation.

### MEETING 4

# Preparing for Transition

#### Check-In

Members share brief (1-2 minute) updates on their developments since the last meeting.

#### *Topic for Full Group Discussion: Transition Preparation*

Chapter 4 is all about making space and time in your life to work on your encore transition. By joining this group, you've already taken a big step. The aim of this meeting is to help people figure out what kinds of adjustments they need to make in order to set up their lives to allow room to work on a transition.

Think about a big transition you've previously experienced, such as finishing a stage of your education, changing jobs, moving houses or cities or dealing with a death in your family.

- What do you know about how you move through transitions and think through major life questions?
- Are you the walk-alone-on-the-beach type, or do you benefit from brainstorming with others?
- How can people in this group or others in your life support you?

#### *Small Group Activity: Making Space*

In small groups or pairs, discuss things you are doing or might be able to do to make space and prepare for your encore transition.

- Is your life set up to give you some time and space to work on your transition?
- If not, are there any small changes you can make to free up some room?
- Have you ever worked with a career coach or counselor? If so, what were those experiences like?

In addition to participating in this group, do you have time to explore your transition by taking a course, reading up on a new field or meeting with people doing the kind of work you'd like to pursue? If not, are there ways you can free up some time or space?

*Note for facilitator:* This is a good time to ask people if they are willing to commit to taking specific actions before the next session. It can be as simple as blocking time on the calendar each week to do some thinking or setting up a weekly walking date with a friend who's a great idea generator and listener. If people warm to the idea, they can report on their commitments as part of the check-in at the beginning of the next meeting.

### **Wrap-Up**

Share news of interest to the group.

### **Assignment for Next Session**

- Read Chapter 5.

## MEETING 5

# Financial Issues

### **Check-In**

Members share brief (1-2 minute) updates on their developments since the last meeting.

### **Topic for Full Group Discussion: Financial Review**

Chapter 5 is about money issues in an encore career. Your group's members may be in very different places financially, but that shouldn't prevent you from supporting each other as you all figure out the financial piece of your encore.

Take a few minutes to read and think about the following questions, then go around the room and share your reflections.

- Do you feel financially ready to make an encore transition, or do you have a lot of planning yet to do?
- Are you where you want to be with your retirement savings?
- Do you have a sense of how much income you need in order to be happy and comfortable?

### **Small Group Activity: Rethinking Your Relationship to Money**

In small groups complete the "Set Priorities" exercise on page 88. This exercise will help you think about the tradeoffs you are willing to make to live the kind of life you want and pursue the work that interests you. If you feel like you don't need to make any financial changes in your life, consider two options: **1.** Offer to help others in your subgroup brainstorm. **2.** Share an instance of how you've made tradeoffs in your life in a way that's worked for you. Additionally, discuss the "tie it all together" paragraph from the exercise and consider these questions:

- What are you willing to give up?
- What must you have?
- Did you learn anything from hearing others talk about their priorities and tradeoff choices?

Reconvene as a larger group to report back and discuss your findings.

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### **Wrap-Up**

Share news of interest to the group.

### **Assignment for Next Session**

- Read Chapter 6.

### **Going Further**

If people want to dig deeper on money issues, consider reading a book either as a group or subgroup (several suggestions are listed under “Financial Planning” in *The Encore Career Handbook* “Further Reading and Resources” appendix). If members want to dedicate a session to the nitty gritty of personal finance issues, consider

inviting a financial planning expert to talk to the group. Tap your collective years of experience and local networks to see if anyone knows an appropriate speaker, perhaps a retired financial advisor. Avoid people who will be looking for business or making sales pitches. You want someone who will give your group an objective overview.

## MEETING 6

# Networking

### **Check-In**

Members share brief (1-2 minute) updates on their developments since the last meeting.

### **Topic for Full Group Discussion: Connecting with Others**

Chapter 6 is about networking and how we relate to others. Answer the following questions to reveal your own style and preferences around connecting with others:

- What’s your natural style of forming relationships? Do you have focused deep relationships with a small group of people, or do you go broad with a wider circle and constantly weave new people into your life?
- Do you prefer to get together in small groups or one-on-one, or do you enjoy parties and other social outings?
- What kinds of groups do you belong to? Might one help advance your encore goals?
- Might it be time to shake things up and start connecting with new groups or communities?

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### ***Small Group Activity: What Are You Already Doing?***

This activity will help you think about ways to add a new dimension to something you are already doing in your life. In your groups, discuss the following questions:

- What's an activity you love, such as sailing, hiking, biking, knitting, painting, spending time with family/children/grandkids?
- What's something that you'd like to do more of? This could be an issue you want to explore further or an activity you want more of in your life, such as work on homelessness, literacy, the environment or exposure to young people.

Brainstorm ways to add a new layer into something you are already doing. Think of ways to delve deeper or merge your interests together. Get reactions from the group. Questions to consider:

- How might you enhance what you already do: Serve food at a shelter with your family? Volunteer at an urban farm that teaches at-risk youth to garden? Tutor? Something else?
- How might such activities advance your encore work? Can you combine a skill you love or a functional thing you like to do with a social purpose?
- If you crafted your ideal social purpose project, what would it look like?

### ***Wrap-Up***

Share news of interest to the group.

### ***Assignment for Next Session***

- Read Chapter 7 and the Appendix section on resumes.
- Dig up your resume and review it. If you have time, update it to reflect your current experience and identify areas where you might like to get some feedback. Bring two copies with you to the next meeting. (If you don't have a resume, create a profile on LinkedIn and print that out for the next meeting.)

## Going Further

Consider adding a meeting to explore various ways to expand your network, including the use of social media, which does not come naturally to many people. Or dedicate a meeting to learning how you can use

platforms like LinkedIn and Facebook professionally to broaden your connections. For reading suggestions, see the "Using Social Media" section in *The Encore Career Handbook* "Further Reading and Resources" appendix.

### MEETING 7

# Your Story

#### Check-In

Members share brief (1-2 minute) updates on their developments since the last meeting.

#### *Topic for Full Group Discussion: Presenting Yourself*

Presenting yourself at midlife offers a unique set of challenges. How do you best tell the story of where you've been and where you want to go? How do you summarize 20 or 30 years of experience succinctly? How do you ensure that your age and experience are seen as assets, not obstacles, to what you want to do next? Focus your discussion on the following questions:

- Think of a time in which someone has reacted to your age in a positive way. Share a story of a time when your age has been an asset.
- Describe the best interview you've ever had for a job, a client meeting or a pro bono role.
- What techniques can resumes use to tell a cohesive story at your life stage?
- View the Appendix and look at the resumes in *The Encore Career Handbook*. Do you relate to any of the issues highlighted?
- Where can you get ideas for how to enhance your resume?

#### *Small Group Activity: Rapid-Fire Resume Review*

People looking at resumes often spend less than one minute scanning them for highlights.

Use this rapid-fire resume review to get quick feedback from two different sets of eyes. The idea isn't to be a wordsmith and perfect the formatting—it's to learn how others react to the way you're presenting yourself. Find a partner and swap resumes. Take one minute to review each other's resumes then give one minute of feedback, paying particular attention to these questions:

- Is the resume easy to scan so important items stand out at first glance?
- Does the resume show a passion for an issue or a certain type of work?
- How would you feel about bringing this person on as a volunteer, consultant or employee?
- What kinds of questions does the resume raise? For instance, if the person has always been self-employed, do you wonder how they would survive as an employee, or whether this person would be able to make a transition from one field to another?

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Once both partners have shared, find a new partner and repeat the exchange. Then reconvene and discuss what you learned from this exercise.

*Note for facilitator:* While people are giving resume feedback, walk around and listen for common themes and issues. Report back to the group about what you noticed. If several people are working on the same issues, lead a discussion to brainstorm around those issues.

### **Wrap-Up**

Share news of interest to the group.

### **Assignment for Next Session**

- Read Chapter 8.

### **Going Further**

If members want outside help, consider bringing in a resume writer or career coach for individual or group assistance. People can also share their resumes at future meetings. See additional ideas in the “Moving Ahead” section at the end of the guide.

## MEETING 8

# Test Your Intuition

### **Check-In**

Members share brief (1-2 minute) updates on their developments since the last meeting.

### **Topic for Full Group Discussion: Crafting Experiments**

If you have a hunch about something that may interest you, one of the best ways to test your hypothesis is to craft an experiment that will allow you to learn more or get a closer look. Experiments can be as simple as talking to a person in the field or reading blogs and books on the subject. Or they can be bigger immersions like shadowing someone for half a day or taking an internship or advisory role.

Take a few moments to think about experiments you have done in your own life and have each member share a story about trying something new. Go around and answer the following questions:

- What was the experiment you did? Shadow someone at work? Volunteer with kids? Take a class in a subject that always intrigued you? Something else?

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- Did the experience deepen your interest or make you want to run away?
- What did you learn from it?

### ***Small Group Activity: Brainstorm an Idea***

In your groups, reflect on what you learned in the last couple of meetings.

- What kinds of things have started to surface as possible interests?
- How might you learn more about what's going on in that field, including ways to get involved and whether your hunch is right that it's something you want to dig into deeper?
- What possibilities exist near where you live?

Using this information, craft an experiment that might help you learn more or take the next step. Think of something that you want to do, like volunteering at a soup kitchen, shadowing someone for a day or learning more about nonprofits focused on at-risk youth or environmental issues. Help each other hone ideas and identify potential resources. Make a commitment that you'll take the first step toward your experiment by sending an email, setting up a phone meeting or researching an organization online. Be prepared to report on what you did at the next meeting.

Keep in mind that you will likely have a lot of experiments along the way as you test out ideas, refine them and learn more about things that interest you. Honing your ability to craft these experiments and narrow your focus will be a very useful skill.

### ***Wrap-Up***

Share news of interest with the group.

### ***Assignment for Next Session***

- Read Chapter 9.
- Be prepared to report on the progress you made in your experiment.

## MEETING 9

# Build Your Skills

### **Check-In**

Members share brief (1-2 minute) updates on their developments since the last meeting. As part of your check-in, report on whether you took the first step of your experiment.

### ***Topic for Full Group Discussion: Skilling Up***

Many encore transitions involve getting new skills or education. Once you get a clearer picture of what you may want to do, you may find that you need to get some education,

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training or update your skills. Even if you don't know what you want to do, you may be attracted to a course that might help you figure it out. Or you may be itching to improve your skills in some area like social media or public speaking that will serve you regardless of the kind of work you're moving into.

Go around the room and have each person share some thoughts on the following questions:

- What's the most useful course or workshop you've ever taken as an adult and why?
- If you're all living in the same geographic area, share the name of a place in the area that you think is offering good programming for lifelong learners.
- Is there a particular class, workshop or course of study you're considering? What questions do you have about it and how might the group support your exploration? For instance, if you are choosing between programs, are you trying to learn more about them, or are you hesitant for some reason that a group member might address?

*Note for facilitator:* As the conversation unfolds, consider teasing out members' feelings and experiences around lifelong learning, skill enhancement and returning to school later in life. The idea may excite many and terrify others. This will also be a great time to take note of which group members have information to share based on their own experiences. Also, point out the difference between the emotional issues people may be dealing with, like how they feel about being an older student, and the practical ones, like saving money and time management.

### **Small Group Activity**

Discuss one of the following in your groups:

- Think of a person who went back to school or took a class that helped prepare her to move in a different direction. Why did the person succeed? One example: Terri Ward, featured on page 23.
- Think about someone who went to school and didn't find the experience positive or helpful for moving toward an encore career. Why didn't this person succeed? One possible reason: too much debt was incurred getting the extra education.

Reconvene as a group to share the highlights from your discussions.

### **Wrap-Up**

Share news of interest to the group.

### **Assignment for Next Session**

- Read Chapter 10.
- Reminder. Don't forget about your experiments. Did you take that first step? Where are you in the process? Is it time for another experiment?

### MEETING 10

# Is Encore Entrepreneurship for You?

#### Check-In

Members share brief (1-2 minute) updates on their developments since the last meeting and report on what steps they took as part of their experiments.

#### ***Topic for Full Group Discussion: Exploring Encore Entrepreneurship***

Encore entrepreneurship is a big tent that includes a range of people—from those who want to work for themselves as consultants or independent contractors to those who want to start or lead nonprofits or mission-focused businesses. Even if you don't want to start your own business or nonprofit, you may be drawn to working with, advising or otherwise supporting someone else's encore venture. Take a few moments for everyone in the group to look at the mini profiles on the following pages of people whose work falls somewhere on the encore entrepreneurship spectrum. Discuss the following questions:

- After reading Chapter 10, do you feel like some form of encore entrepreneurship is for you?
- Do you feel like you want to innovate and lead in your encore, or are you much more drawn to supporting others who are doing work that inspires you?
- Are you drawn to any of the models of encore entrepreneurship from the mini profiles? If so, what resonates with you—is it the issue addressed, the business structure or something about the lifestyle?
- Might you be interested in starting or working for this kind of organization or model?
- How might you learn more about encore entrepreneurship?

#### ***Small Group Activity: How Entrepreneurial Are You?***

Quietly complete the “Do You Have What It Takes?” quiz on page 214. In small groups, discuss your results. Choose a leader to guide the discussion and report back on interesting themes.

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When the larger group reconvenes, ask those with a majority of “yes” answers to raise their hands. Talk about whether the idea of creating an organization holds some appeal. Now focus on those who mostly answered “no” on the quiz. How do these members feel about starting something on their own? Have the entire group consider the following questions:

- Were there differences in the responses of the “yes” and “no” groups?
- Did you find that those who answered mostly “yes” were more inclined toward the idea of starting an organization or business from scratch?
- How important is the business model to you? Are some members daunted by the idea of starting an organization or small venture, but warmer to the idea of freelancing or consulting?

### *Wrap-Up*

Share news of interest to the group.

### *Assignment for Next Session*

- Read Chapter 11.

### **Going Further**

People interested in creating their own ventures may want to add a meeting (or more) dedicated to related issues, including developing business

plans and figuring out the financials. See more suggestions in the “Moving Ahead” section at the end of the guide.

### ENCORE ENTREPRENEURS

## Living by Example

#### **Judi Henderson-Townsend**

##### ***Encore Career: Started a Recycling Business***

Judi's encore career was a huge departure from her earlier work as an account executive in the health care and travel industries. She stumbled upon her new career while searching for a used mannequin for an art project. Instead of buying just one, she ended up buying 50 mannequins on an impulse. Although Judi had never touched a mannequin or worked in a retail environment before, she thought renting mannequins would be a fun part-time business. Little did she know that this move would quickly lead to a full-time venture when she discovered that retailers routinely throw old or broken, non-biodegradable mannequins into the landfill. Judi's business, Mannequin Madness, recycles over 100,000 pounds' worth of mannequins a year and received a special achievement award from the Environmental Protection Agency. [encore.org/judi-hendersontownsend](http://encore.org/judi-hendersontownsend)

#### **Elaine Santore**

##### ***Encore Career: Started a Nonprofit to Help People with Home Chores and Repairs***

Elaine and a partner started Umbrella of the Capital District in Schenectady, NY, providing "handypeople" who do home maintenance for older adults. Umbrella now serves about 600 clients in the Schenectady area. For an annual fee, they provide access to a pool of about 140 handypeople who do minor home repairs, maintenance and housekeeping. The goal is to allow residents to stay in their homes while giving workers something meaningful to do in their retirement years. [encore.org/Elaine-Santore](http://encore.org/Elaine-Santore)

#### **Rosalind Joffe**

##### ***Encore Career: Coaches People Coping with Chronic Illness***

In 30 years of working while battling severe chronic illness, Rosalind continually had to make decisions, large and small, based on her health. Once her illness was under control, she confronted another daunting challenge: how to succeed professionally when a disabling chronic illness got in the way of her ability to perform. She found a lack of resources to help her and felt dissatisfied with being told that work is stressful and people with chronic illness should stop working. Using what she learned from dealing with her own health, Joffe now works as a coach and advocate, helping others figure out the best ways to work while dealing with chronic illnesses. [cicoach.com](http://cicoach.com)

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### **James Robinson**

#### ***Encore Career: Started a Nonprofit to Help Homeless Young People***

James's journey has been one of professional development as well as personal challenges. Turning his struggle into his strength, James developed the nonprofit GLBT Advocacy & Youth Services, Inc. to establish programs for youth from the gay, lesbian, bisexual and transgendered community. The organization provides independent living services to at-risk young people, ensuring that they have a place to call home. [launchpad.encore.org/finals/entry/james-robinson](http://launchpad.encore.org/finals/entry/james-robinson)

### **Janine Vanderburg**

#### ***Encore Career: Training Retirees to Move Into Nonprofit Fundraising***

For more than 20 years, Janine has run a consulting firm that specializes in working with nonprofits. She developed a three-day intensive program to prepare emerging leaders in nonprofits for fund development positions. Through a customized training for retirees transitioning from corporate sales to nonprofit fundraising, she is helping to identify development professionals across the country who can be trained to become campaign and community fundraisers. [launchpad.encore.org/finals/entry/janine-vanderburg](http://launchpad.encore.org/finals/entry/janine-vanderburg)

### **Brenda Moore**

#### ***Encore Career: Training Women to Own and Run Coffee Businesses***

As the owner of the PB Roasting Company in Detroit, Brenda knew the coffee business well. But on a 2007 trip to Ethiopia, she was amazed by the network of women operating independent coffee micro-businesses and saw the potential for an empowering outlet for women in the U.S. Now, the Java Hope Project provides women with business training and support within the coffee industry—and with the opportunity to acquire their own independent coffee carts. [takepart.com/thebestexoticmarigoldhotel/winners/june](http://takepart.com/thebestexoticmarigoldhotel/winners/june)

### MEETING 11

# Next Steps

#### Check-In

Members share brief (1-2 minute) updates on their developments since the last meeting and report on any progress with their experiments.

#### ***Topic for Full Group Discussion: What's Next for the Group?***

If you've followed the suggested agendas for the first 10 meetings, your group will have accomplished a lot and covered a range of topics. You will have learned much about each other, your stages of transition and areas of interest. You will have a sense of what aspects of the group have helped you move toward your personal goals. This is a natural time to step back and assess what the group should be doing going forward. Use this meeting to reach consensus on whether your group wants to continue. If so, discuss what kind of structure and focus the group should have as it moves ahead.

Members should then share a few thoughts on how they are feeling about their own process and needs going forward. As a group, take some time to think about the following questions.

*Note for facilitator:* Write the questions on a flip chart or white board if you have one.

- What have you learned about yourself by participating in this group?
- How has your encore readiness changed?
- What have you found to be the most helpful parts of meeting with this group?
- Is there anything you wish there had been more or less of?
- If we were to continue to meet, what themes would you want to explore?
- Would there be a way to better support one another as you move through your transitions?
- How do you feel about the size and composition of the group? For instance, is there enough time to help one another and have meaningful conversations?
- Are people connecting as a group, or are members in such different places that they need different things?
- Is the group moving together in one natural direction, or are subgroups being formed by members interested in diving into specific issues like encore entrepreneurship or wanting to work on some kind of venture or activity together?

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Once you've spent some time on these questions, break into smaller groups and brainstorm about ideas for continuing to support one another. Discuss the following questions for 10 minutes and then nominate someone to report back to the main group about the suggestions that emerged:

- Moving forward, what should the meeting structure look like?
- Should meetings focus on a defined issue, such as a book chosen from the resources reading list or a guest speaker on a topic of mutual interest? See suggested additional meeting topics in the “Moving Ahead” section that follows.
- Do you want a looser structure that allows for more checking in and helping each other tackle challenges?
- Is it time to involve new participants? Should you break into smaller groups of people who want to focus on specific issues? Should you close the group and celebrate your success?

### *Wrap-Up*

Share news of interest to the group.

What happens next is up to you! Let us know what you decide by emailing [ECH@encore.org](mailto:ECH@encore.org) with “Encore Transition Group” in the subject line. From time to time the team at [encore.org](http://encore.org) will report back on what's happening in these encore transition groups. Sharing your group's experience will help other groups figure out what kinds of models work best.

## MOVING AHEAD

# Additional Meeting Topics, Resources and Ideas

Your encore transition group may take many forms. You may like the structured approach we've outlined, or you may prefer to gather more informally with others exploring encore options. Your group may want to go further on some topics and skip others. Or you may opt for a book discussion format—with the chosen books related to encore transition issues.

Feel free to tailor the suggested topics below to the needs and structure of your group. The ideas can be incorporated as you work through the sample agendas, added on after you've finished those agendas or used by individuals or subgroups who want to delve deeper into specific areas separately.

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### ***Finding Your Passion***

The exercises in Chapter 3 of *The Encore Career Handbook* aim to help you learn more about the things that excite you and add meaning to your life. You may want to dedicate a meeting to focusing on doing these exercises with your group.

If you're following the sample agendas, this would work well after Meeting 3.

### ***Money Issues***

Consider reading one or more of the following books and discussing financial planning around encore careers. You might also invite a financial planner to meet with your group to discuss personal finance issues. Look for someone who will focus on providing information rather than soliciting business.

- *All the Money in the World*, by Laura Vanderkam
- *The New Frugality*, by Chris Farrell
- *The Hard Times Guide to Retirement*, by Mark Miller

If you're following the sample agendas, this would work well after Meeting 5.

### ***Networking and Social Media***

Discuss ways to expand your network, including the use of social media, which does not come naturally to many people. Dedicate a meeting to exploring how you can use platforms like LinkedIn and Facebook professionally to broaden your connections.

Suggested reading:

- *Never Eat Alone*, by Keith Ferrazzi
- *Share This! How You Will Change the World with Social Networking*, by Deanna Zandt

If you're following the sample agendas, this would work well after Meeting 6.

### ***Resumes, Interviewing and Presenting Yourself***

Search for your encore with the best tools (resume, bio, online presence) and a clear sense of what you have to offer and how you will talk about yourself. Invite a career coach to provide tips and feedback on resumes and ways to present yourself that will accentuate the value of your experience to potential employers. Ask around your network for referrals and look for coaches who have worked with people making midlife transitions. You can also try the Life Planning Network ([lifeplanningnetwork.org](http://lifeplanningnetwork.org)) or [encore.org](http://encore.org).

Suggested reading:

- *Great Jobs for Everyone 50+*, by Kerry Hannon
- *Jobs That Matter: Find a Stable, Fulfilling Career in Public Service*, by Heather Krasna

If you're following the sample agendas, this would work well after Meeting 7.

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### ***Encore Entrepreneurship***

If you're drawn to the idea of starting your own social venture, consider a meeting dedicated to related issues, including developing business plans and figuring out the financials. You may decide to create an ongoing group of folks who want to create their own ventures and share ideas and support.

Suggested reading:

- *Social Entrepreneurship: What Everyone Should Know*, by David Bornstein
- *The Start-up of You: Adapt to the Future, Invest in Yourself, and Transform Your Career*, by Reid Hoffman and Ben Casnocha

If you're following the sample agendas, this would work well after Meeting 10.

### ***Encore Activism***

Dedicate a meeting to exploring the best organizations for volunteering and community service in your area. Consider whether members of your group would like to join forces and work together on a particular cause or issue. For ideas about organizations, see the "Volunteering" section in *The Encore Career Handbook's* "Further Reading and Resources" appendix.

### ***Retirement***

The idea of retirement can stir up many issues even for people planning to do social purpose work part-time or full-time. Dedicate a meeting to discussing related issues and questions: Are you ready to slow down? How much do you want to work? Are there legacy projects you're thinking about?

### ***Book Discussion***

It's possible that your group will gravitate toward book discussion. If you like that format, see the resources section of *The Encore Career Handbook* for suggestions. Good starters include:

- *Encore: Finding Work That Matters in the Second Half of Life*, by Marc Freedman
- *The Big Shift*, by Marc Freedman
- *Boundless Potential*, by Mark S. Walton
- *Live Smart After 50: The Experts' Guide to Planning for Uncertain Times*, by The Life Planning Network: [lifeplanningnetwork.org/](http://lifeplanningnetwork.org/)
- *The Age for Change: An E-Book for People 50+*, by Coming of Age: [ebook.comingofage.org/](http://ebook.comingofage.org/)

### ***Field Trips***

School classes do it. So can your group. Visiting a nonprofit, going to hear a lecture or taking a social media class can help spark ideas, create networking opportunities and give you a sense of places and jobs you might be interested in pursuing. It can also be fun. Explore and enjoy.